Notes

Notes

The course introduction is an opportunity to get to know others who are attending class as well as to agree on classroom courtesy. The Instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive credit for attending class by signing the attendance sheet.

Prerequisites

- BEACON Overview BC100
- BEACON SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Personnel Administration Terms, Concepts, and Display Data PA210

SLIDE 3

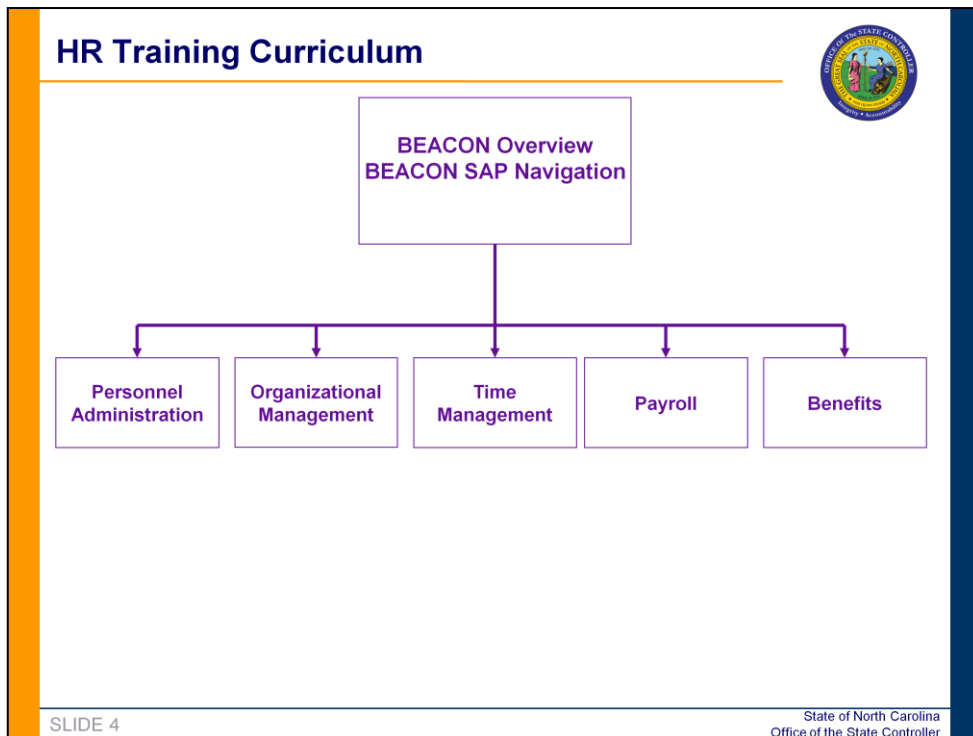State of North Carolina
Office of the State Controller

Notes

There are five prerequisites that you must take before attending this course. Attending these prerequisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Create and Maintain Employee Data* course.

BC100, BC110 and PA200 are self-paced web courses that you can take at anytime.

PA210 can be taken either virtually or through an instructor-led classroom.

PA313 is a Virtual Class.

HR Training Curriculum

BEACON Overview
BEACON SAP Navigation

- Personnel Administration
- Organizational Management
- Time Management
- Payroll
- Benefits

SLIDE 4

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Notes

The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the Personnel Administration module.
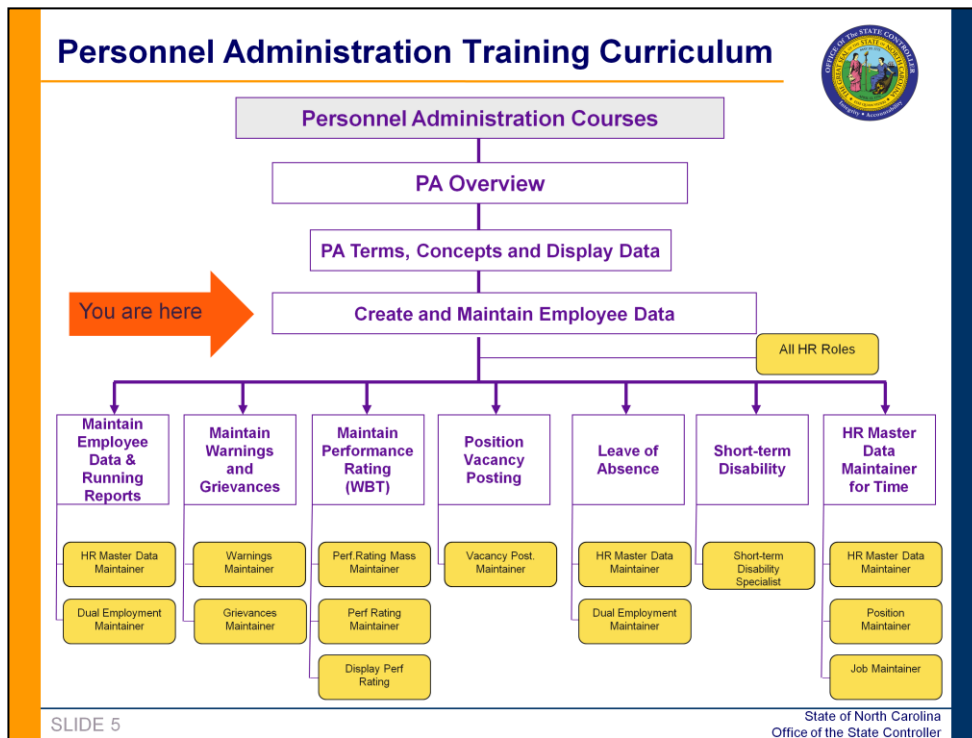
Notes

Within the Personnel Administration module, there are several courses. Your position determines which courses you may be required to attend.

Course Map

| Lesson 1: Review of PA Infotypes |
| Lesson 2: Introduction to Actions |
| Lesson 3: Entering Employees into SAP |
| Lesson 4: Adjusting Salaries |
| Lesson 5: Promoting Employees |
| Lesson 6: Separating Employees |
| Lesson 7: Entering Transfers |
| Lesson 8: Reviewing Additional Actions |
| Lesson 8: Course Review |

SLIDE 6

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Notes

Course Objectives

Upon completion of this course, you should be able to:

- Describe the process for the various Actions
- Create new records associated with the life cycle of an employee
- Modify existing employee data

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Office of the State Controller

Notes

Welcome: Strategy for Training

Tell me	**Concepts**
	Your Instructor will describe the process, responsibilities and the transactions – LISTEN
Show me	**Demonstrations**
	Your Instructor will demonstrate job-related tasks performed in OSC HR/Payroll SAP – HANDS OFF
Let me	**Exercises**
	You will complete the exercises which allow for hands-on practice in class – HANDS ON
Support me	**Availability**
	Your Instructor will be available to answer questions while you complete the exercises

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Notes

The *Create and Maintain Employee Data* Student Guide provides a copy of the PowerPoint presentation used in the classroom training. You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the OSC HR/Payroll SAP training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Map

| Lesson 1: Review of PA Infotypes |
| Lesson 2: Introduction to Actions |
| Lesson 3: Entering Employees into SAP |
| Lesson 4: Adjusting Salaries |
| Lesson 5: Promoting Employees |
| Lesson 6: Separating Employees |
| Lesson 7: Entering Transfers |
| Lesson 8: Reviewing Additional Actions |
| Lesson 8: Course Review |

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Recall terms and concepts from the *PA210 Terms, Concepts, and Display Data* course.

- Identify that entries made in PA affect an employee's time, benefits or pay.

- Review the various Infotypes in a PA Actions.

SLIDE 10

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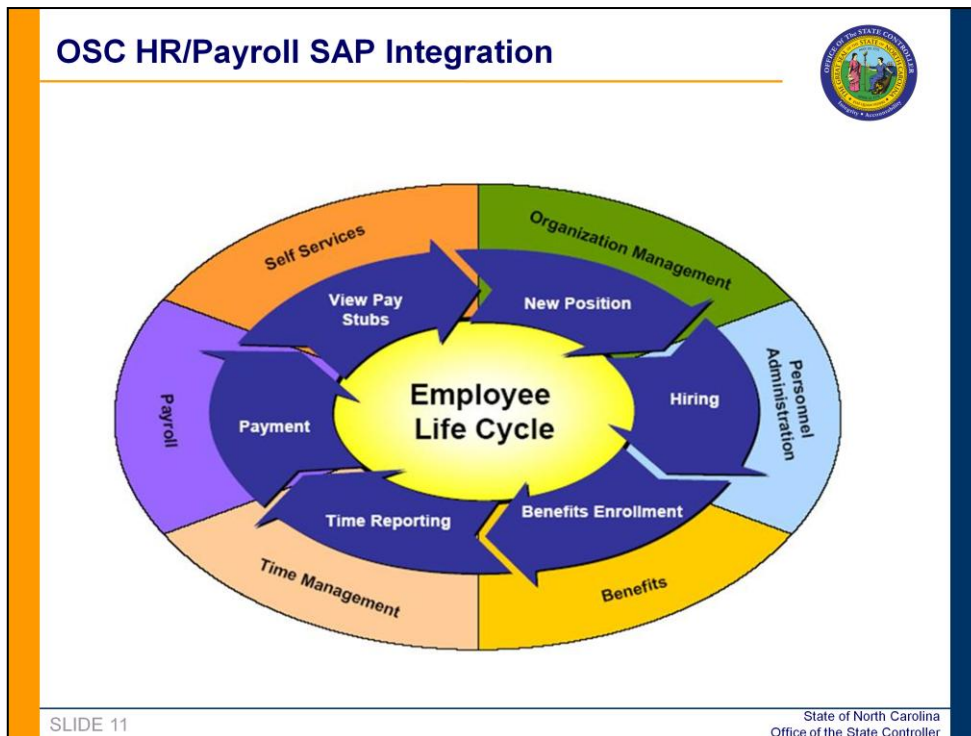
Notes

Notes

Based on the data you viewed in *PA210 Terms, Concepts and Display Data*, you should have a good understanding of the various infotypes that are part of an employee's personnel record. Because OSC HR/Payroll is an integrated system, every entry made in Personnel Administration affects some component of an employee's time and pay.

Some infotypes for which PA is responsible are applied directly to the employee. Many of the infotypes that affect an employee's time and pay display automatically during PA Actions. Other infotypes are applied to the position, which also affect how the employee enters time and is subsequently paid.

PA Infotypes and Time, Benefits, Payroll

- IT0000 - Actions
- IT0001 - Organizational Assignment
- IT0002 - Personal Data
- IT0006 - Address (permanent)
- IT0007 - Planned Working time
- IT0008 - Basic Pay
- IT0041 - Date Specifications
- IT0552 - Time Specification/Employ. Period
- IT2003 - Substitution
- IT2001 - Absences

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Notes

The infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll. It is important to understand how the entries made in PA are related to results in those areas. Note that the above list represents only a few PA infotypes; it is in no way a complete list of all PA infotypes.

Notes

The **Actions 0000** infotype indicates the events that occurred on the employee's personnel record. Some examples are: New Hire, Promotion, Range Revision, etc. Actions are covered in more detail in *PA310 Create and Maintain Employee Data*. In addition, the infotype shows the employment status (Active, Inactive, Withdrawn). Time, Payroll and Benefits use information from IT000.

Time, Payroll and Benefits pull information from **Organizational Assignment IT0001**. All of the fields on this infotype default from the position assigned to the employee.

Personnel area: Used by Payroll to determine where wages and salaries are posted and from where they are paid

Subarea: Identifies various working schedules for Time Management rules

Cost Center, Fund, Functional Area, Business Area: Are related to Finance and Funding

Employee Group: Drives benefits eligibility, leave and pay calculations

Employee Subgroup: Defines work status (full time, part time) overtime rules, and impacts benefits

Payroll area: Determines the payroll cycle

Work Contract: Identifies if employee will pay full or partial cost for health insurance premiums

Percentage: Always 100%

Position and Job: The position to which the employee is assigned and the job to which the position is related

Organizational Unit: An entity within the organizational structure

PA 310 – Create and Maintain Employee Data

Personal Data IT0002

Social security number, date of birth and marital status—information that is important for tax reporting, payroll, and benefits

Addresses IT0006

The various tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are dynamically associated with IT0006 – permanent address. If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

NOTE: When entering an address, always begin with *Address line 1* and only use *Address line 2* when necessary to enter additional address information.

If the address information is incorrect:

- a separated employee does not receive the final pay.
- employees do not receive W2s at the end of the year.

Planned Working Time 0007

Work Schedule Rule Example (D01N08GN)

D = Days

01 = Schedule number

N = No weekends

08 = Hours per day

GN = General Schedule (common schedule)

Weekly working hours drives benefits

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Notes

Planned Working Time: The Work Schedule Rule (WSR) is the foundation upon which an employee's time is processed in OSC HR/Payroll SAP. Each employee is assigned a WSR in PA that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days as well as scheduled non-work days. The WSR can represent work patterns repeated over a single or multiple weeks and may include day, evening and night shift designations that trigger premium payments (if applicable) at rates designated on the employee's position (if the position is appropriately flagged). The WSR does not limit the number of hours an employee may record on any given day, but will only allow leave to be taken on scheduled work days. Many fields are dynamic and trigger other time functions. For example, Time Sheet Defaults (IT3015) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of "1" indicates that a time sheet is required, whereas a "9" indicates a Time Sheet is not required. If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative upon Reinstatement.

An employee should only be assigned as a negative time employee if he or she is working 5 days a week, 8 hours a day.

Notes

Example of IT007 Impacts Employee's Pay (1st and last pay)

To show how IT0007 affects an employee's pay, the following describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th , the employee worked 8 days of the possible 22. The Pay is figured by this formula: 8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, in conjunction with IT0008, determined two different pay outcomes for the employees once again illustrating how entries made in PA affect employee pay or time.

Basic Pay: Salary or hourly wages. The *Salary Amount* button does not calculate for DOT employees, but does calculate for all non-DOT wage types.

You would seldom make an entry directly on IT0008. Adjustments involving an employee's pay would result from an Action.

Date Specifications IT0041

Time evaluation bases leave accruals and longevity payments on date types contained on IT0041 for all permanent employees. (Newly hired Supplemental Staff employees will not have IT0041.) Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

The Employee Overview screen is a "snapshot" of an employee's information.

The transaction is initiated by entering data to define who and what time frame an HR user needs to view a particular employee's information.

1. Enter **ZEMP in the Command field on the Easy Access screen and press the Enter key or click the green check ball.**

2. Enter an Employee ID.

3. The current date defaults into the Selection Date field. You have the option to enter any date that the employee has data in the system. If you enter a date that is not valid, you receive the message 'No Information for the date Entered'. If you are not authorized, you will receive a message indicating that you do not have authorization.

4. Click the Execute button to perform the transaction.

Notes

The EE Infotype Overview is a transaction screen that lists all active infotypes for an employee during a specified period of time.

Enter the Transaction Code PC00_M02_LINF0 in the Command field and press or click Enter. Make the necessary selections (personnel number and validity dates). Click "execute."

You can expand or collapse any and all of the infotypes.

To see the detail of a specific infotype (e.g. IT0001), double-click the infotype or select it and click at the top of the screen. The system will display the detail screen (same as *PA20 – Display Master Data).* You may click the green back arrow to return to the EE Infotype Overview screen.

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the various Actions associated with the life cycle of an employee
- Map PMIS Actions to OSC HR/Payroll SAP reasons
- Identify how to access help
- Describe various helpful tips and tricks
- Explain the Workflow process

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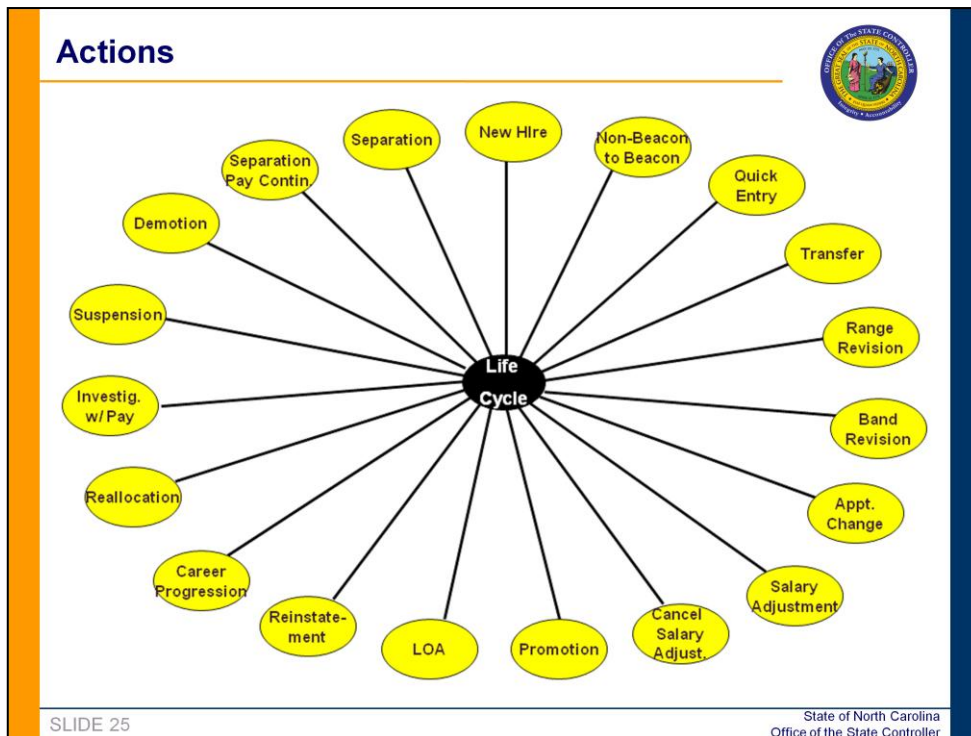
Notes

Notes

As discussed in the *PA Terms, Concepts and Display Data* course, the life cycle of an employee comprises many different events. OSC HR/Payroll SAP defines those events as a specific infotype called **Actions** (0000). Actions for the State of North Carolina are shown above. New Actions that were not part of the PMIS system include: Investigatory, Separation Pay Continuation, Quick Entry, and LOA (Leave of Absence). Observe there is no longer a separate LWOP Action. LOA replaces LWOP.

An Action combines logically related infotypes into one infogroup. The infotypes in the infogroup are sequentially arranged and automatically display. This helps to simplify the data entry for the Action. You don't have to remember whether a particular infotype should be included—OSC HR/Payroll SAP automatically includes the infotypes that are associated with a particular Action. Depending upon the employee's specific data, you may not need to enter data on each of the infotypes presented in the Action.

Personnel Administration

- Each Action has one or more associated reason.
- Many previous PMIS actions are now OSC HR/Payroll SAP reasons.
- Actions describe various events in the employee's life cycle.
- Actions ensure that all necessary infotypes are presented during the process.

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Notes

Each Action has one or more reasons that are associated with the life cycle event. When you create an Action in OSC HR/Payroll SAP you determine and select the appropriate reason for the employee's life cycle event. Some of the actions that you previously used in PMIS are now the reasons in OSC HR/Payroll SAP.

With the Actions infotype (0000) you can display an overview of all the important changes related to an employee, and you can thus document the most important stages an employee passes through in his or her history with the State. Only the current data was downloaded into OSC HR/Payroll SAP.

Actions You Will Create in Class

Action Name	
1. New Hire	8. Promotion
2. Non-BEACON to BEACON	9. Transfer
3. Quick Entry	10. Separation
4. Reinstatement	11. Separation with Pay Continuation
5. Salary Adjustment	
6. Appointment Change	
7. Range Revision	

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Notes

The State of North Carolina has a variety of Actions that you will use. However, in this course, you will only create a selected few, as listed above. This course is designed to give you the opportunity to learn four basic functions: getting an employee into the system, making salary adjustments based on work events, transferring and separating the employee. Additional Actions are discussed, although specific exercises are not performed in this class. Leave of Absence is covered in a subsequent class, *PA420 Leave of Absence* as well as in *PA370 Short-Term Disability*.

The demonstrations and exercises that are presented hereafter assume that all necessary policies and procedures have been followed, and appropriate forms, etc. have been submitted and approved. **All of the approvals and processes that you had to do prior to OSC HR/Payroll SAP are still the same**.

In addition, the necessity of keeping appropriate hard copies of personnel records (applications, reviews, etc.) remains. These documents should still be saved and stored as they were prior to OSC HR/Payroll SAP.

Personnel Administration Job Aids

Log into BEACON University and view the various PA job aids:

- Personnel Areas and Subareas
- Employee Groups and Subgroups
- PA Infotypes
- PA Actions and Reason Definitions
  - Observe that some of the actions that you previously used in PMIS are now the reasons in OSC HR/Payroll SAP
- Business Process Procedures (BPPs)
- Simulations
- Job Aids

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Notes

The instructor will show you how to display various online job aids located in BEACON University.

eAssistant

This tool provides step-by-step instructions for each SAP transaction. You can access eAssistant from any OSC HR/Payroll SAP screen. Just click **Help** on the menu bar and then select **BEACON Help**. A new window is displayed on top of the OSC HR/Payroll SAP. You can drag the sides of the screen to make it larger or smaller.
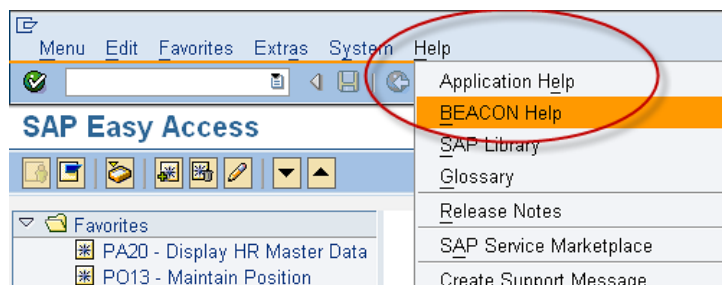
Miscellaneous Tips and Tricks (1 of 5)

Before you begin with your first Action, review the following helpful tips and tricks:

- Multiple infotypes on an Action – use PA30
- Case sensitivity – upper and lower
- Employee group and subgroup changes on a position

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Notes

Multiple infotypes for a specific item

In most cases, each infotype is presented only one time in an Action. When an employee needs more than one infotype (bank details, objects-on-loan, certifications etc.), enter the applicable data during the Action and use transaction code PA30 to enter the additional data.

Case sensitivity

OSC HR/Payroll SAP is case sensitive. The standard for the State uses upper and lower case (sentence format). It is important to maintain this format for consistency in reports and searches. This is true for all entries, including Actions and PA30 transactions.

Employee Group and Subgroup changes on a Position

When a position has been revised by OM to change the employee group and subgroup, that change does not feed to PA until a new PA Action is created. To change the Employee Group and Subgroup of an employee, it is necessary to do an Appointment Change Action.

Miscellaneous Tips and Tricks (2 of 5)

Date Specifications – IT0041

- Stores date types used by Time Evaluation and other HR functions for all permanent employees
- Must be an accurate reflection of the employee's State career.
- Time Evaluation bases leave accruals and longevity payments on date types contained on Infotype 0041.
- Newly hired Supplemental Staff employees will not have IT0041; however conversion Supplemental employees do have IT0041.

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Notes

Date type 01 - Original Hire Date - the employee's first hire date; should remain the same throughout the employee's State career.

Date type 02 - Agency Hire Dare - initially set to the employee's hire date. This date type is automatically maintained when an employee is reinstated following a leave of absence or transfers from one State agency to another State agency.

Date type 07 - Lottery Anniversary Date - the date an employee is hired into or transfers to NCEL.

Date type 04 - Judicial Anniversary Date – the date an employee is hired into or transfers to Judicial.

Date type 03 - Last Day Worked Date - the employee's final day of work prior to a separation from the State.

Date type NR - 457 Catch-Up Date - an employee's normal retirement date represents the date at which the employee will turn 65 and is thus eligible for additional contributions into his or her 457 Savings Plan. Date type NR will only be created if an employee is eligible and requests to make additional 457 contributions.

Date type 06 - Notification of RIF - the date an employee is officially notified his/her current position will no longer be available. This date also represents the beginning of the 12 month period of RIF eligibility and benefits.

Miscellaneous Tips and Tricks (3 of 5)

- Prior Service IT0552 – use PA30; contact BEST
- Length of Service

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Notes

Prior service – IT0552 – Time Specifications/Employment Period
If you make an entry or change IT0552 (Time Specifications/Employment Period), you **must** contact BEST because they run a program in the background that ties all IT0552s together. Creditable service earned prior to OSC HR/Payroll SAP must be entered on IT0552. Once an employee is entered into OSC HR/Payroll SAP, the system automatically calculates creditable service and the longevity date through the Time module. IT0552 does not display in any PA Action; therefore, use PA30 to enter the creditable service dates (after you verify that the employee is entitled). IT0552 calculates the number of months of prior service based on the dates that were entered. If the months don't calculate correctly, you may have to adjust the dates accordingly just as you did in PMIS (this rarely happens). If you do have to adjust the dates, you should enter the correct work dates in the comments field. If the employee has prior service from more than one Agency, create a separate PA30 IT0552 for each service record. **Do not change the date on the original (conversion) IT0552 so that it calculates the total time**. For example, an employee has an OSC HR/Payroll SAP record of 50 total service months with the State and leaves State employment to work for a local government agency from which the State accepts time worked. When the employee is re-instated, create a separate IT0552 for that service (rather than manipulating the end date on the original IT0552).

Length of Service

If you have the "Display Time" role, you can use PT_BAL00 to view the latest number of months of service. See the online job aid *Length of Service*, for details on accessing the transaction.

Miscellaneous Tips and Tricks (4 of 5)

- Execute info group – if accidentally back out of an Action
- Save versus Next Record

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Execute info group button:

If you accidentally click the Back button during an Action, the system backs you out to the *Personnel Actions* screen. To return to the infotype you were previously on, select the same Action, date, and personnel number, and click Execute. On the next screen, select **Execute info group**. A warning message is displayed indicating that the personnel action is not saved. Click **Continue** and page forward until you get to the infotype you accidentally exited. You may notice that some infotypes did not retain the prior information you entered (like taxe and monitoring of tasks). Simply re-enter the data. Continue entering data on each infotype until the Action is complete. Do **not use PA30** and **individually complete** the infotypes because dynamic processes that are connected to payroll, time and benefits will fail to process (processing the Action causes the dynamic processes to occur).

Save versus Next Record

Even if you make no changes to an infotype, you should still **Save**. The infotype may be connected to dynamic infotypes which will not display if you have not saved.

The only time you would use the **Next record** button is when you do not need to enter data in the infotype. For example, if you do not need to enter data on the Monitoring of Tasks (0019) infotype, you would use the Next record button. If you used Save instead of Next record, you would receive an error message and not be able to move forward. The general rule is: **Save** infotypes that are pre-populated, <u>even</u> if you do not make any changes. If the infotype is blank and you are not entering data in any of the blank required fields, use **Next Record**.

Notes

Gather all data before initiating Action

It is a best practice to gather all of the employee's information before initiating an Action—don't start the Action until you can finish it. There may be occasions, like a New Hire, when the information is not available (bank details, tax, etc.). In that case, after you get the approval via Workflow, let the PCR stay in the inbox until the employee arrives before you initiate the Action. If the employee is a no-show, you only have to cancel the PCR since the Action was not initiated. When you do initiate the Action, if the bank and tax information is still not available set the Bank Details (IT0009) to check. See the note in Exercise 3.1 concerning Bank Details. Tax withholding automatically sets to single, zero allowances.

Monitoring of Tasks (infotype 0019)

This infotype is like a tickler file and is date driven. You enter a due date and then run the Date Monitoring report (S_PH0_48000450 in SAP or B0099 in BI) to view the various tasks due for a week. If the task is completed prior to the due date, it will still display on the reports unless you delimit the Monitoring of Tasks infotype.

Comments

The Comments function is useful as you are entering data (via an Action or a PA30). You can enter comments on many infotypes by selecting Edit > Maintain text from the menu (if grayed out, adding comments is not available for that infotype). A new window displays where you can enter comments. The standard for comments is to preface your remarks by the date and your name. Keep in mind the remarks must be professional. You cannot report from the comments. It is a best practice to make sure that you document all PA Actions or infotype revisions by entering comments.

Notes

Workflow

- Actions require Workflow.

- Workflow is the electronic approval process in OSC HR/Payroll SAP.

- Certain Division and/or Agency Positions are Approver Positions for Actions.

- Comments entered on the Workflow request are not carried over to text on Actions.

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Notes

All PA Actions need approval before the Action can be executed. The OSC HR/Payroll SAP Workflow enables approvals (or rejections) to be obtained electronically. In your Agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, it may duplicate a portion of your manual process. You still have to provide the same type of documentation to the Approver that you have always provided - that has not changed. However, in OSC HR/Payroll SAP, you can attach documents to the Workflow as well as write notes.

NOTE: Keep in mind that the notes and documents associated with Workflow do not automatically move forward when processing the infotypes of the approved workflow document.

The authority to approve an Action is associated to the Position, and not to the person and person's role. If a person leaves an approver Position, the authority to approve stays with the Position. A person who is subsequently assigned to that Position, also assumes the approval authority (unless the Position is changed by Security).

Use Transaction code **ZPAA076** to *initiate* the OSC HR/Payroll SAP electronic approval process, referred to as Workflow (WF).

On the initial *Employee Action Request* screen enter the applicable data. After the Action type and Reason is entered, the second *Employee Action Request* screen is displayed. This screen has two columns. The left column displays the current status of the employee. On the right, enter the new data pertinent to the Action being processed. If the employee is hourly, be sure that the Pay Scale Area field is "hourly". Enter the hourly amount in the hourly field (not the annual salary field).

It is critical to review the data entry for accuracy before initiating WF. After WF is initiated, you will not be able to go back in and correct an error. In that case, you have two choices (a) contact the Approver and ask him or her to reject it so that it automatically comes back to you. You make the corrections and send back through the WF process, or, (b) if the WF has already reached Shared Services (SS), you will need to ask Shared Services to make the changes for you. You may also ask them to delete it so that you can create a new one.

When you initiate Workflow you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it.

After all the data is entered and WF is initiated, OSC HR/Payroll SAP sends the request to the appropriate Approver who can approve or reject the request (there may be more than one level of approval).

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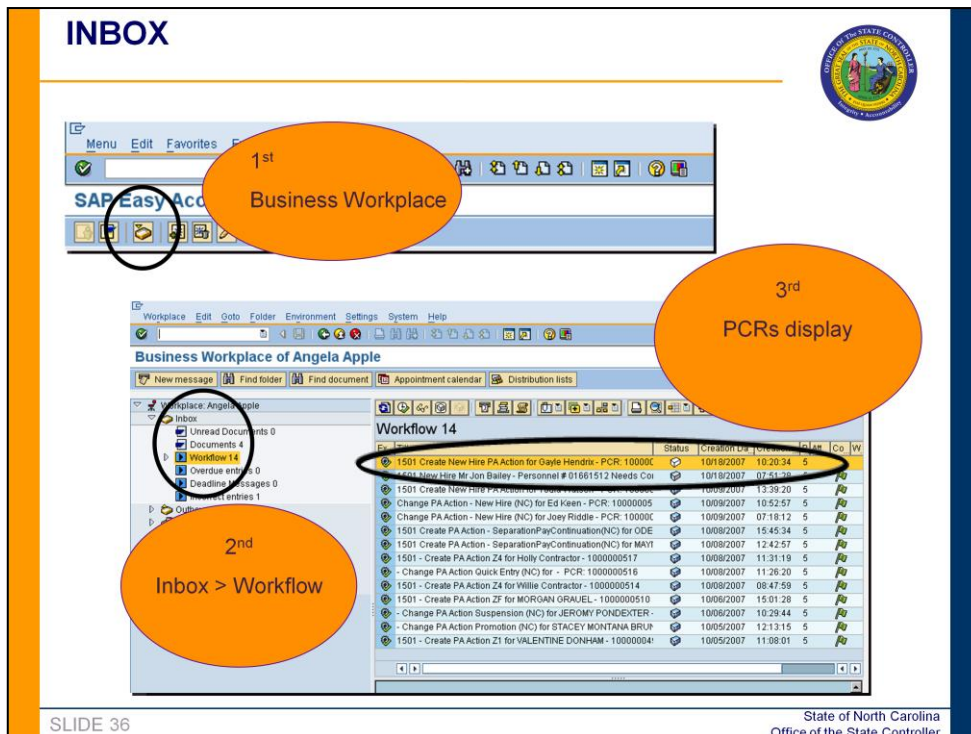
Notes

The second part of the Workflow is to see if your Workflow item has been approved or rejected. Go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click Inbox > Workflow. All the approved or rejected PCRs that you have initiated are listed on the right. Double-click the approved PCR, and the applicable screen automatically displays for the Action. You are now ready to execute the appropriate Action.

Workflow is always the first step before you initiate an Action. You do not use Workflow for PA 30 transactions. If you are ever in doubt whether Workflow is needed, access the Personnel Actions screen using PA40. If the Action is on the list, it must be processed through Workflow. If you attempt to bypass Workflow for an Action, you will receive the error message below, and not be allowed to continue.
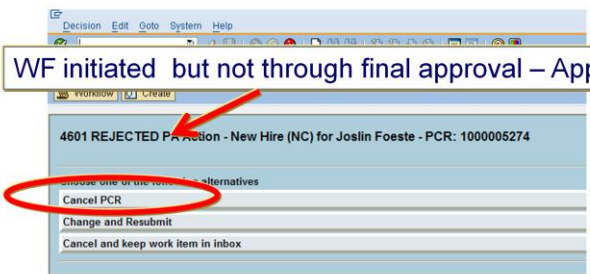
Deleting PCR (Initiator)

1. WF saved, not initiated – Use 🗑
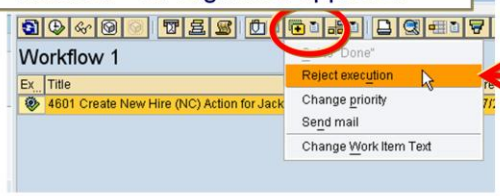
2. WF initiated but not through final approval – Approver rejects

4601 REJECTED PA Action - New Hire (NC) for Joslin Foeste - PCR: 1000005274

Choose one of the following alternatives
Cancel PCR
Change and Resubmit
Cancel and keep work item in inbox

3. WF initiated – through final approval

Workflow 1

Ex. Title
4601 Create New Hire (NC) Action for Jack

Reject execution
Change priority
Send mail
Change Work Item Text

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The method you use to delete a PCR depends upon where it is in the process.

1. You have saved the PCR but not initiated Workflow:

From the ZPAA076 screen, use the delete button 🗑 .

2. You initiated Workflow but the PCR has not reached final approval:

Contact the Approver and request that it be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

3. You initiated Workflow and PCR has been approved by final approver:

You can only use this option if you have **not executed** the PCR. Highlight PCR and click the "Other Functions" button. From the drop-down menu, select "Reject Execution" (see above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

Lesson Review

In this lesson, you learned to:

- Describe the various Actions associated with the life cycle of an employee
- Map PMIS Actions to OSC HR/Payroll SAP reasons
- Identify how to access help
- Describe various helpful tips and tricks
- Explain the Workflow process

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Process Actions using Workflow
- Use the appropriate Action to assign employees to the OSC HR/Payroll SAP system
- Select the applicable reason for each Action
- Distinguish between the hire Actions for new employees

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Notes

Notes

When processing a **New Hire**, the *Hiring Action* screen displays when you execute the PCR from your inbox. The employee's basic data (name, gender, SSN, etc.) is entered. As you probably recall from *PA200-PA Overview*, the information is sent to the Retirement System, which is external to OSC HR/Payroll SAP. The Retirement System assigns an external Personnel Number. **A word of caution**: ensure that the Personnel No. field is blank. If you have recently processed a New Hire, the Personnel No. field may be pre-populated with that previous number.

After the Personnel Number is assigned, the Personnel Action screen is automatically displayed. You will then select the New Hire action and continue entering the necessary data to complete the transaction.

CAUTION! Never manually assign a personnel number (although OSC HR/Payroll SAP will not prevent you from doing so). Manually assigning a number causes the employee personnel number to be out of sync with the Retirement System.

NOTE: If the Retirement System is down and you need to initiate a New Hire, contact BEST Shared Services for assistance.

Use the Actions described below to assign an employee to SAP. It is important to understand when to use a specific Action before entering employee data. Follow State policy regarding effective hire date when first day worked follows a beginning payroll period after a weekend or holiday.

Before an employee record is entered into OSC HR/Payroll, use the BI *Verify Employment* report found in the Cross Agency Verification **folder** to search for the employee by name and date of birth to ensure that he or she in not already in the system. In addition, check PMIS to see if a record exists. You should also use the **PPOSE** transaction to ensure that the Position to which the employee will be assigned is vacant.

New Hire is used to create a personnel record for a newly hired employee who has never been employed by any State agency. The New Hire Action is only applicable if the individual is not in the OSC HR/Payroll SAP system nor PMIS. This Action includes employees who are temporaries, pickup firefighters, and National Guard.

Non-BEACON to BEACON is used if the employee was a former employee in PMIS, but not OSC HR/Payroll SAP.

Quick Entry is used to hire contractors, dual employment borrowing, volunteers, board members, and federal employees who are to have access to OSC HR/Payroll SAP.

Reinstatement/Reemployment is used to return employees to State employment or return them from some type of leave. As mentioned earlier, if the employee is in PMIS, but not in OSC HR/Payroll SAP, you use Non-BEACON to BEACON, not the Reinstatement Action.

Notes

PA 310 – Create and Maintain Employee Data

As the New Hire diagram illustrates, there are several steps that must take place outside of OSC HR/Payroll SAP before a New Hire Action is executed in OSC HR/Payroll SAP. The process described is for hiring new employees. The New Hire transaction is not used if an individual is being hired as supplemental staff, such as contractor, federal, or board member. In these cases Quick Hire is used.

Before an individual can be hired, a vacant Position must exist. The vacancy occurs because (1) an existing Position was vacated, or (2) a new Position for an organizational unit was approved and established by the State. Each type of vacancy must be posted in accordance with State policy.

After the vacancy posting time frame has expired, all qualified candidates are interviewed. A qualified candidate is selected and sent a State-approved Offer Package. After the candidate receives and accepts the Offer, the Manager or Supervisor sends the new hire information to HR via manual form, email, phone call, fax, or other distribution method.

HR initiates the Workflow approval process. The initiator of the Action reviews his or her Inbox to see when the final approval is received. After the initiator activates the PCR from the Inbox, the Hiring Action screen is automatically displayed. HR completes basic data on the Hiring screen, and it is automatically sent to the State Retirement System for a Personnel Number assignment. HR chooses the New Hire Action to continue entering the new hire data.

Reason for the New Hire

- New Hire
- National Guard
- ENR DFR Pick-up Fire

Notes

Notes

The Instructor will access eAssistant and then assist you in accessing the OSC HR/Payroll SAP. After all have logged on, watch the Instructor complete the Action, using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

It is important that you do not enter data during the demonstration; the training database only has enough data for students to use during exercises. If you use data during the demonstration, you are using data that has been designated for other students. This will prevent them from being able to complete their exercises.

Exercise #2.1

- New Hire

The Cultural Resources Library is undergoing a digitization process and will hire a new Digitization Clerk into its organizational unit (20010287). The new employee will begin working today at the minimum of the salary range. The new employee will be issued a badge and two keys. The employee's military status is Reserve.

Initiate Workflow to begin the new hire process.

- **Important:** You will use this data in subsequent exercises. Be sure to complete all exercises.

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Notes

EE Group/Subgroup

OSC HR/Payroll SAP defaults the Employee Group of all new hires as a **permanent** employee. When you are entering new hire data, you must change the Employee Group on Workflow as applicable if you are entering a probationary, time limited or trainee employee.

Bank details

The completion of the Bank Details infotype (0009) must be entered in order for payroll to run on the new employee. If the bank details are not available at the time of the data entry, it is your responsibility to obtain that information and enter the infotype before the system is closed for payroll processing. Even if you have instructed the employee to enter the data in ESS, you still must follow up with the employee to ensure he or she makes the entry prior to payroll closing.

Manually Adding Performance Infotype

There is a time frame between mid-April and June 30 every year that you will have to manually add the Performance Rating Infotype on all new hires. See the BPP for details.

Exercise #2.2

• New Hire – REJECTED Workflow

Cultural Resources has hired a temporary employee who will begin working today in a Technology Support Specialist position. The hourly rate is $30.00. The employee will be issued a laptop (serial # 4788). The employee is married.

Initiate Workflow to begin the new hire process.

When the Approver receives the Workflow, it is returned to the Initiator. The Initiator will need to read the note to determine why it was rejected, correct the PCR and resubmit.

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Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Rejected Workflow

When an Approver rejects a Workflow PCR, he or she is required to write a note to the Initiator. In order to read the note, make the correction and re-submit the PCR, the Initiator must use the following steps:

- Access the *Workflow Tracker* link from the Inbox.
- Click *Change and Resubmit* at the Decision Step screen.
- Enter the applicable correction and click Save.
- Click the Back button.
- Click the *Complete Workflow Item* button. This re-submits the corrected PCR to the Approval process.

This exercise is designed to give you the opportunity to received a rejected PCR and read the accompanying note.

Notes

Based on the selection you make in the **Residence Status** field on the *I-9 Residence Status (0094)* infotype, additional infotypes will display (as a reminder, you chose Citizen in both New Hire exercises). Remember also that you must still enter non-citizen employees into Windstar (the official record keeping system for the State).

Non-Resident Alien

When you select Non-Resident Alien on infotype 0094, there are two *Create Residence Status (0048)* infotypes that display (see illustration above) in the following order:

- Record type: US01 Non-Resident Aliens – Visa Information
- Record type: US02 Non-Resident I-94 information

You determine which 0048 infotype you need to use: US01 or US02. If you do not need US01, use the **Next Record** button to page forward to US02.

Resident Alien

When you select Resident Alien on infotype 0094, only one *Create Residence Status (0048)* infotype is displayed. In the **Residence status** field, select the applicable type from the list. There are 57options in the drop-down list, including both US01-Non-Resident Aliens Visa Information and US02-Non-Resident I-94 Information.

PA 310 – Create and Maintain Employee Data

Non-BEACON to BEACON (NC) - Personnel Action

Personnel Actions

Non-Beacon to Beacon(NC)

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The Non-Beacon to Beacon Action is used when:

• The returning employee has a record in PMIS, but does not have a record in OSC HR/Payroll because he or she left State employment before his or her agency converted to OSC HR/Payroll. The employee may be returning to the same agency as the one he or she left (as well as to the same position), or may be going to a new agency and position. As long as the former employee has a record in PMIS, but no record in OSC HR/Payroll, you will use the Non-Beacon to Beacon Action. Reinstatement is only used to reinstate an employee from BEACON to BEACON.

• A University employee is leaving the university system and accepting a position with a state agency.

Reasons associated with the Non-Beacon to Beacon Action

• Transfer Lateral
• Return to St w/in 12 mths same S/G

• Transfer Reassignment
• Return to St w/in 12 mths higher S/G

• Transfer Promotion
• Return to St w/in 12 mths lower S/G

• Return to State w/in 5 yrs
• Return to State after 5 yrs

• Grade-Band Transfer *

NOTE: If you use the Grade-Band transfer reason, on Workflow enter Pay Scale type, Pay Scale Area and Pay Scale Group before you press Enter; otherwise, you will get an error message. Of course, you can merely press Enter to bypass the error message and then enter the fields as well.
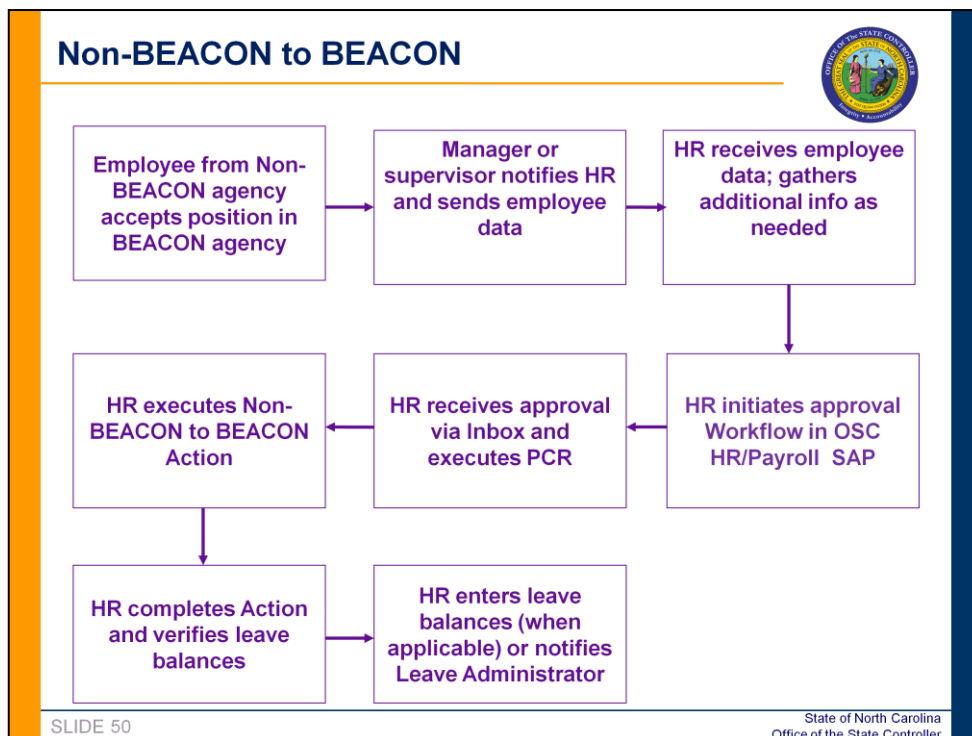
Notes

As you enter the information for the employee, you will observe that the same infotypes display for the Non-Beacon to Beacon Action as display for a new hire. This is logical since there is no employee record in the agency's OSC HR/Payroll HR system—all of the employee's information is in his or her agency's current non-OSC HR/Payroll SAP system. Therefore, you are creating a completely new HR file in OSC HR/Payroll SAP, including all of the applicable infotypes, (which includes enrolling the employee into the applicable Retirement System).

You should make sure that you obtain any leave balances active on the employee. You will verify the balances from the previous agency. If you have a dual role as both the HR Master Data Maintainer and the Leave Administrator, you will use PA30 to create infotype 2013 - Quota corrections for each transferring leave balance (this infotype is not presented during the Non-Beacon to Beacon Action).

If your role only consists of being the HR Master Data Maintainer, you must contact the Leave Administrator to ensure that the employee's leave balances are brought up to date.

Important! When an employee is reinstated (or Non-BEACON to BEACON) and received a pro-rated longevity you need to create a IT02012 / Z033 to document the pro-rated longevity already received so employee doesn't get a full payment when the year is complete. Refer to the *Longevity Job Aid* on BEACON Help for details.

Exercise #2.3

- Non-Beacon to Beacon – Lateral

Mary Poppins, an Office Assistant IV at UNC-CH, has accepted an Office Assistant IV position at the Cultural Resources Archives and History office for a salary of $25,705. Her current salary is $25,705 and she is a permanent, subject to FLSA OT employee. She had 110 months of creditable service at UNC-CH. Mary was given a State ID and two office keys.

NOTE: If you transfer an employee from one employee type to a different employee type, you must change the Employee Subgroup.

Initiate Workflow to begin the process.

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Notes
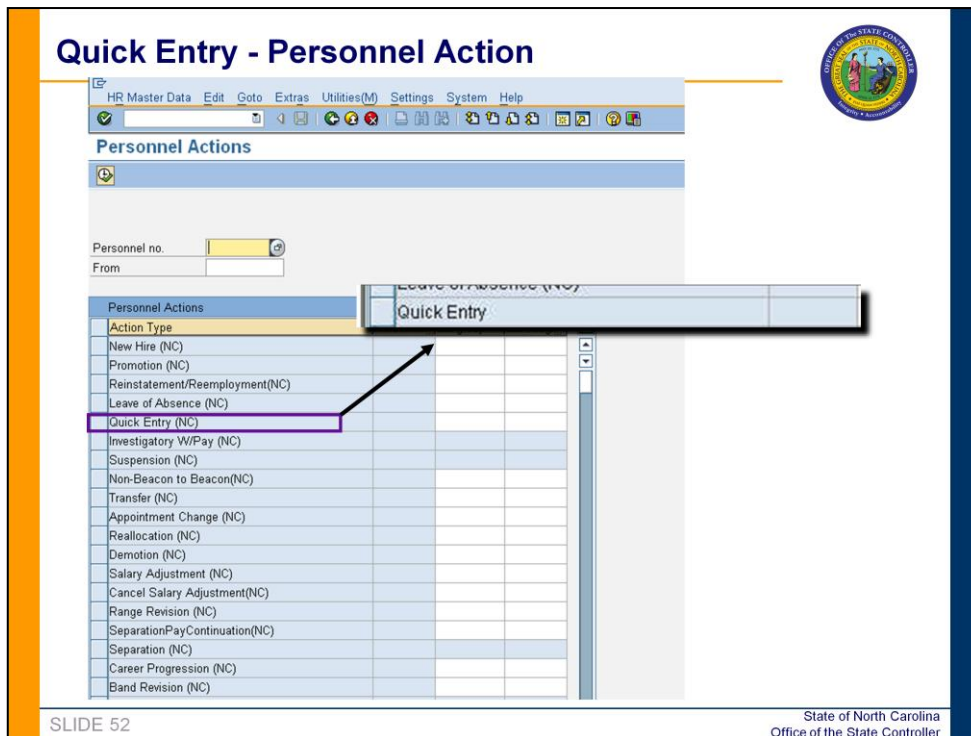
Quick Entry assigns <u>specific</u> <u>categories</u> of employees to the OSC HR/Payroll system as State staff. These employees are not paid through OSC HR/Payroll , but may supervise employees paid through OSC HR/Payroll or may need access to the OSC HR/Payroll system for other purposes. Because Quick Entry is an Action, it must be initiated via Workflow (ZPAA076).

You only need to use Quick Entry if you want the employees in the categories listed below to have access to OSC HR/Payroll SAP. If you do not want them to have OSC HR/Payroll SAP access, do not enter them into the system.

- Contractors
- Volunteers
- Federal Employees
- Board Members
- Borrowing Employees/Dual Employment

OSC HR/Payroll SAP does **not** send the Quick Entry data to the Retirement System for an external Personnel Number. Instead, the OSC HR/Payroll system assigns an internal 8-digit personnel number, in sequential order.

Please Note: The data entry convention for the social security field for Quick Entry is 999-9x-xxxx. "X" stands for the last **5 digits** of the employee's social security number (SSN). This helps ensure that if these Quick Entry employees ever become a regular state employee, they won't have an existing SSN in OSC HR/Payroll SAP.

Notes

Exercise #2.4

• Quick Entry

Cultural Resources Battleship Division has been assigned a federal employee to work as a Maintenance Mechanic IV. The position is funded by the federal government (the employee is not a State employee, but is a Federal employee being paid by the Federal government). The employee will have access to the OSC HR/Payroll SAP system; therefore a Quick Entry Action is needed (if no access will be granted, you don't need to use Quick Entry).

Initiate Workflow to begin the Quick Entry process.

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Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

PA 310 – Create and Maintain Employee Data

Reasons for Reinstatement

- Return to State within 12 months (same salary grade)
- Return to State within 12 months (higher salary grade)
- Return to State within 12 months (lower salary grade)
- Return to State within 5 years
- Return to State after 5 years
- Return from Short-Term Disability Trial Rehab
- Return from Short-Term Disability Complete
- Return from Long-Term Disability
- Return from Disciplinary Suspension
- Return from Investigatory Placement
- Return from Military Leave
- Return from Workers' Comp Trial Rehab
- Return from Workers' Comp Complete
- Return from Educational Leave
- Return from FMLA
- Return from Family Illness
- Return from Parental
- Return from LOA - other
- Return to Supplemental

Sick Leave Balance

If employee is returning within 5 years, the sick leave quota will still be active in the system. However, in the future if employee returns **after** 5 years, then the re-instating agency will need to delimit the 'old' sick leave quota to a date before the re-instatement date (obviously, this won't be an issue for several more years).

Notes
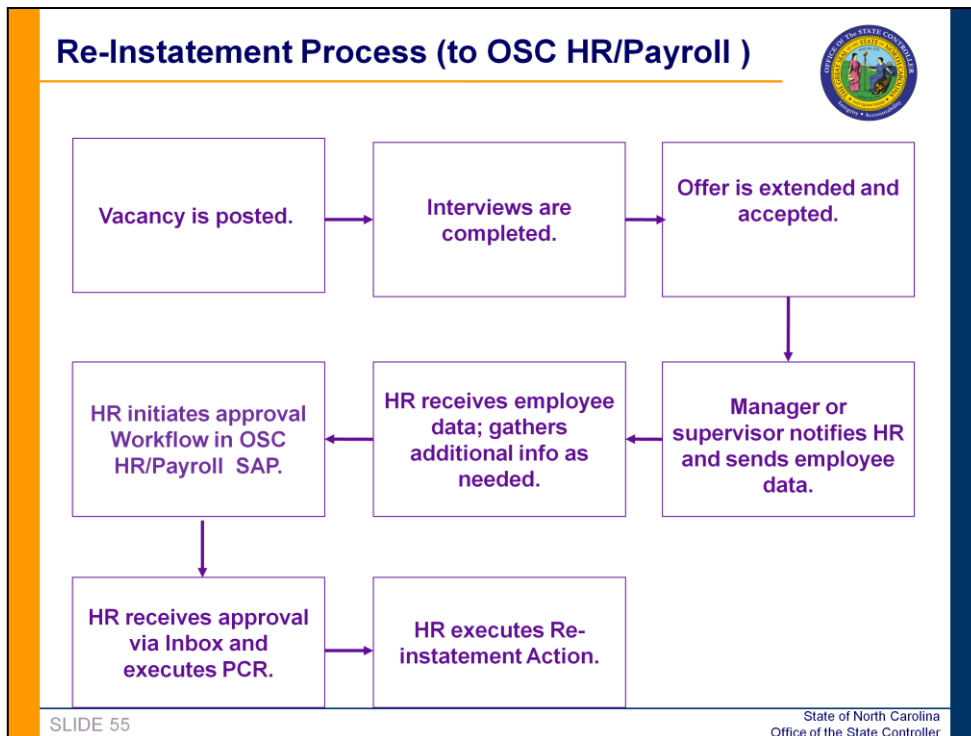
Notes

Although there is only one Reinstatement Action, there are two instances in which it is used: (1) returning an employee from LOA (covered in *Advanced Create and Maintain Employee Data*) or (2) reinstating a former OSC HR/Payroll employee (who has a record in the OSC HR/Payroll system). The difference between the two are the number of infotypes the Action presents. When you are returning an employee from LOA, you are presented with fewer infotypes than when you are returning a previous OSC HR/Payroll employee to employment. In the latter, you are presented with the same number of infotypes as a New Hire Action. The above process describes a Reinstatement other than from LOA.

Employees who separated within three months of cutover to OSC HR/Payroll were converted into the system. Therefore, if any of those employees come back to work for the State, you should use the Reinstatement Action.

Cost Distribution Infotype (0027) This infotype is assigned to every position, however, when an employee is separated, the position defaults to 99999999. When an employee is separated, the cost distribution is assigned to the employee. This ensures that employees who receive any type of payment after separation will be able to receive those payments. During a Reinstatement Action, the Cost Distribution Infotype (0027) will automatically be delimited from the system.

Finding employees

Before you can process existing or previous employee data you must access the employee's record. There are a variety of ways you can search for an employee:

1. ***Personnel Number:*** Enter the Personnel Number into the *Personnel no.* field.

2. ***Shortcut*** : Use a shortcut **(=n.xxxx)** in the Personnel No. field to search by last name.

    (**Example:** =n.hendrix - NO spaces.)

    A list of all employees with that last name displays. Double-click to select the appropriate employee.

3. ***Matchcode:*** Use the Match code at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

Verifying the Action is appropriate

Before you initiate an Action on a current employee, it is a best practice to verify that the Action you are about to take is applicable. For example, you cannot reinstate an employee who does not have a Separation Action as the current record. Use PA20 and the overview of the Actions infotype to verify that the Action you are about to take is appropriate.

Notes

Instructor Demonstration

- In this demonstration, the Instructor will:
  - Reinstate an employee who is returning to State employment

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Notes

Position default number

Observe on the Organizational Assignment infotype that the employee's Position number defaulted to one with a series of 9's. When an employee is separated, his or her position always defaults to 99999999.

As indicated earlier, prior service is not entered during the New Hire, Non-BEACON to BEACON or Reinstatement Actions. After you verify that the employee is entitled to prior service, you must access PA 30 and enter the dates of prior service on infotype **Time Specification/Employ. Period (0552)**.

Viewing previous employee data

If your security access permits, you can see some of the information concerning employees in other Agencies. Run the Verify Employment report found in the Cross Agency Verification folder to view the employee's personnel record.

Exercise #2.5

• Reinstatement

Karla Hart formerly worked with the State of North Carolina and left for the private sector. After only a few months, she decided to come back to the State. The employee is returning to Cultural Resources as an Information & Communications Spec I, which is the same position (salary and grade) that she held before she left. The salary is the minimum of the salary range.

The effective return date is today. She completed the requirements to become a licensed counselor while she was away (see below).

Some of the employee's information changed while other information remained the same.

Initiate Workflow to begin the process.

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Notes

Important! When an employee is reinstated (or Non-BEACON to BEACON) and received a pro-rated longevity you need to create a IT02012 / Z033 to document the pro-rated longevity already received so employee doesn't get a full payment when the year is complete. Refer to the *Longevity Job Aid* on BEACON Help for details.

NOTE: In your work environment, a certification or license is only added when it is a requirement of the position. In Karla's case, the license is not a requirement but is being presented here to provide the training experience.

In this exercise some of the employee's information, like addresses, has changed since she was last employed by the State. Make the changes as applicable during the Reinstatement Action; however, remember to save a pre-populated infotype even no changes were made to it.

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Lesson Review

In this lesson you learned to:

- Process Actions using Workflow
- Use the appropriate Action to assign employees to the OSC HR/Payroll SAP system
- Distinguish between the hire Actions for new employees
- Select the applicable reason for each Action

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:
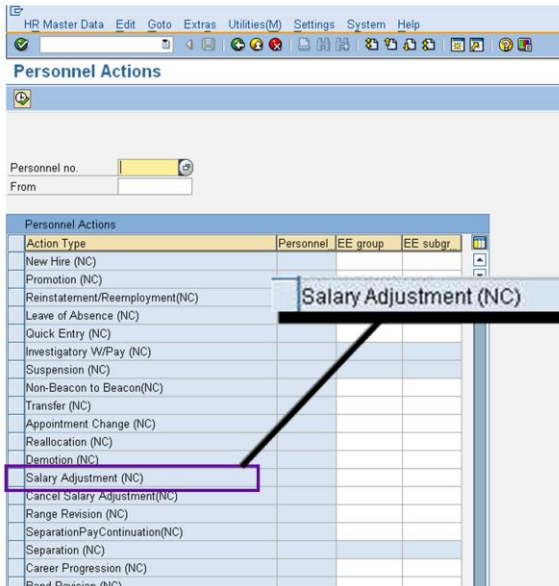
- Distinguish between making a salary adjustment, appointment change, and a range revision

- Identify the job adjustments that must be made prior to creating a range revision

- Describe the difference between a range revision when funds are available, and when funds are not available

- Explain the Reallocation process

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Notes

Salary Adjustment - Personnel Action

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Notes

Reasons for Salary Adjustment

- Salary Adjustment
- Retention Adjustment
- Lead Wkr Adjustment
- In-range–Higher Lvl
- In-Range–Equity
- In-Range-Turnover
- Geographic Differential
- CGRA

- Performance Increase
- Acting Pay
- Trainee Adjustment
- EPA Supplemental Pymt
- In-Range – Incr Var
- In-Range – Retention
- In-Range – Oth Labor Mkt
- Site Differential
- Legislative Increase
- LEO Sworn

NOTE: Some of the reasons above apply to career banding and some do not. If you do not see the applicable reason in Salary Adjustment for career banding, you will use the Career Progression Action (covered in PA410).
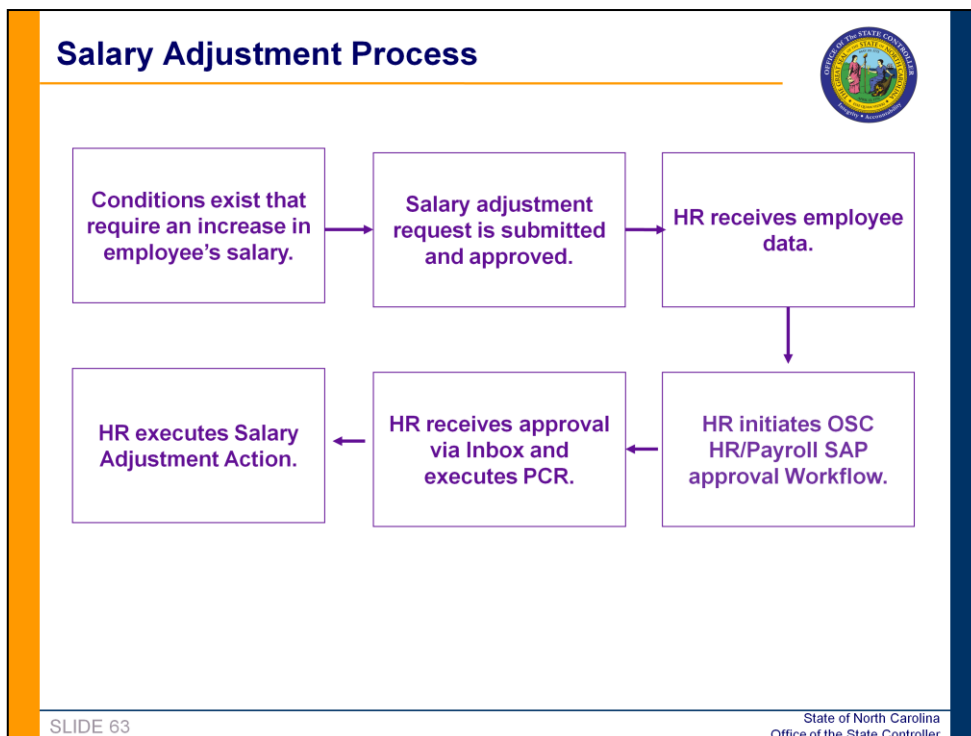
Notes

A Salary Adjustment is an increase in an employee's salary within the employee's current salary range and within the Agency where the employee is currently employed.

Cancel Salary Adjustment Action

If you give a salary adjustment for any of the reasons listed on the previous page and later determine that it needs to be canceled, use the Cancel Salary Adjustment Action. The same reasons for the Salary Adjustment Action are applicable for the Cancel Salary Adjustment Action.

Instructor Demonstration

- In this demonstration, the Instructor will:
  - Create a salary adjustment for an employee.

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Notes

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #3.1

• Salary Adjustment

The supervisor of the first employee you hired (Exercise 3.1) has been in a serious accident and is out on leave for at least four months. Your employee, who is a Digitization Clerk, is being asked to assume some of the major responsibilities of the supervisor (Digital Project Manager) for a specific length of time. Adjust the salary of the Digitization Clerk so that the employee is receiving an additional pay of $4,000. The effective date is the 1st day of next month and will end four months from that date. In your work environment, you would use PA30 to enter a reminder (Monitoring of Tasks) to remove the acting pay from the employee at the end of four months.

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Notes

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Notes

Reasons for Appointment Change

- Trainee to Permanent
- Time-Limited to Permanent
- Probation Time-Limited to T/L
- Part Time to Full Time *
- Full Time to Part Time *
- Change in hours *
- Exten of Appt - no money involved
- Supplemental to Probation
- Supplemental to Permanent
- Intermittent to Probation
- Probation to Permanent
- Permanent to Time Limited
- Permanent to Supplemental
- Permanent to Intermittent
- Change in FLSA

* **NOTE**: Do not merely change the hours on IT0007; use the Appointment Change Action as applicable.

Appointment Change Process

Employee successfully completes probationary or training period → HR receives employee data → HR initiates OSC HR/Payroll SAP approval Workflow

HR executes Appointment Change Action ← HR receives approval via Inbox and executes PCR ← (from above)

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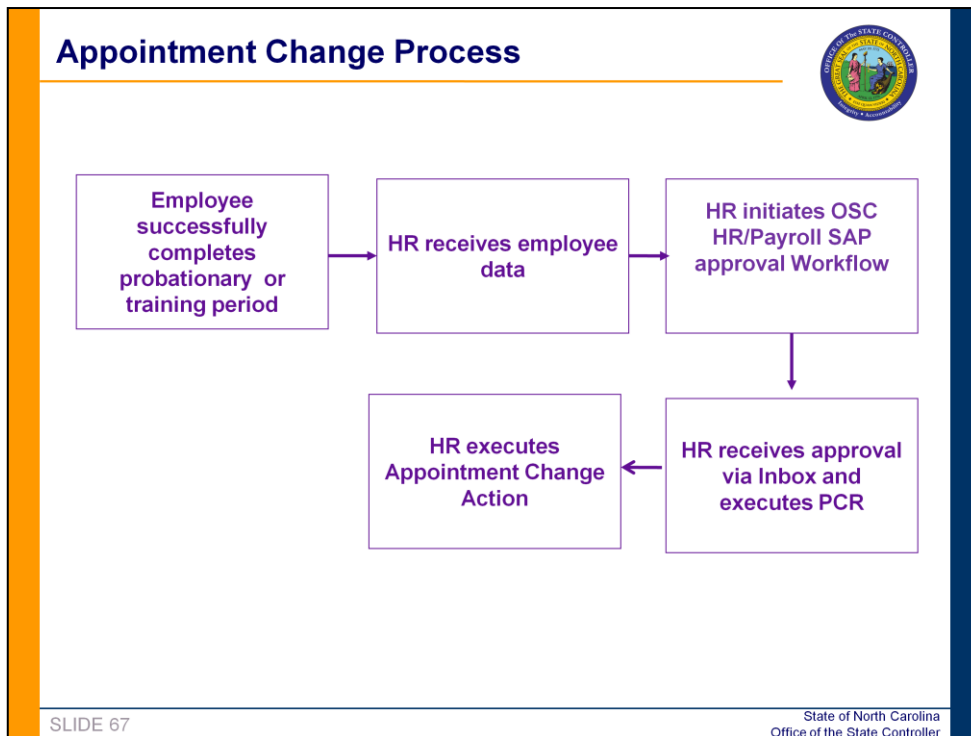
Notes

An **Appointment Change** occurs when an employee has successfully completed his or her probationary or training period and receives an appointment to either a permanent or a time-limited position. Based upon the supervisor's recommendation, the employee may transition from probationary (or training) status at anytime from 90 days to nine months. In order for the employee to receive an increase in salary, an Appointment Change Action (rather than a Salary Adjustment Action) must be used. This is because the <u>employee subgroup must be changed</u>.

When you create an Appointment Change, not all infotypes that display will require that you change information. Your Agency, as well as the type of appointment change, determines this. Here are some of the infotypes or fields that you <u>may</u> need to change:

- Employee Subgroup
  - if moving from Full-Time (FT) to Part-Time (PT), or vice versa
  - if moving from probationary or trainee to permanent
- Planned Working Time - if moving from FT to PT, or vice versa
- Basic Pay - if salary has changed (usually changes with trainee-to-permanent)
- Monitoring of Tasks – example, trainee progression

The Appointment Change Action allows you to give the salary increase at the same time you modify the Employee Subgroup (a Salary Adjustment Action only allows you to modify the salary).

Exercise #3.2

- Appointment Change

Leona Grayson was hired in Cultural Resources as a Historic Sites Specialist I in trainee status, and has completed the training progression. You need to create an Appointment Change to change the employee's status to permanent, full time, not subject to FLSA overtime. In addition, the employee received an additional $500 in salary.

Initiate Workflow to begin the process.

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Employee Subgroup

Keep in mind when you save the Copy Actions (0001) infotype for this type of scenario, the employee subgroup determines if the employee is eligible for overtime.

Basic Pay (0008) – USD or USDN

Observe that on the salary infotype (0008) the value is USD. However, if the employee was a permanent DOT employee, the field would read USDN because DOT permanent positions require 5 decimal currency. In that case, OSC HR/Payroll SAP will automatically change the USD field to USDN. The 5 decimal currency rule does not apply to DOT temporary employees.

Changing temporary employees to permanent employees

If a temporary employee accepts a permanent position, one of the following is applicable:

1. If they change position numbers it is either a Transfer or a Promotion.

2. If they don't change position numbers it is an Appointment Change. You will also modify the salary as applicable in the Appointment Change Action. Be sure to justify salary in Maintain Text.

Caution! If the Action moves the employee from one payroll type to another (bi-weekly to monthly or monthly to bi-weekly), you only initiate the Workflow. When the Workflow is approved, you contact BEST to complete the Action.

Notes

Reasons for Range Revision

- Range Revision Full
- Range Revision Partial
- Range Revision after Effective Date Complete
- Range Revision after Effective Date (Retro to Min)
- No Salary Adjustment

The reason, *Range Revision Partial ,*is used when an employee is receiving only part of the funds. At a later date, if additional partial funds are released, you will create a new Range Revision and use partial as the reason with the new effective date, and not the date of the original Range Revision Action. Of course, if the additional released funds are for the full amount, you would use "Range Revision after Effective Date Complete" (with the current date) instead of Range Revision Partial.

The reason *Range Revision after Effective Date (Retro to Min)* can only be used to bring an employee up to the minimum.

Range Revision Process

Change in labor market is verified. → New range is approved by State Personnel Commission. → BEST Shared Services (OM) changes job class to new grade level.

Are funds available for salary increase? ← HR identifies the Positions and employees who are affected by the revision. ← OSP notifies Agency HR of Jobs affected by the revision.

Yes / No

HR executes WF, PCR, and Range Revision. Action is completed.

HR executes WF Range Revision. → Choose *No Salary Adj.* as the reason. → Execute PA30, 0052 to reserve balance. → When funds are available, execute WF Range Revision and choose appropriate reason.

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Notes

Range Revision is a change in the salary range, resulting from changes in the labor market. Any salary range change must have the approval of the State Personnel Commission (SPC). The revision may result in a change to the minimum and maximum, to the minimum only, or to the maximum only.

After the SPC approves a salary range revision, BEST Shared Services OM will make changes to the Job class. This must happen before Personnel Administration can initiate the Range Revision in OSC HR/Payroll SAP.

NOTE: A change in the Job will automatically change the salary range of all Positions that are within that Job (Class).

After the Job has been updated, HR must identify the employees who are affected by the change and then initiate a Range Revision via Workflow for each employee. If funding is available, the applicable reason and salary changes are made and the Action is completed. However, if funding is not available, HR still initiates the Range Revision Action, but chooses *No Salary Adjustment* as the reason. In this case, HR must then execute additional steps to *reserve* the balance. This latter type of Range Revision will be discussed further in a subsequent lesson.

Notes

Before executing the Workflow PCR, verify the employee's current grade. Use transaction code PA20 to view the Basic Pay (0008) infotype. The current grade should be 62.

When processing the Range Revision Action, observe on the PCR that the employee's grade has already been changed. That change is a result of the Job change made by BEST Shared Services, Organization Management (SSOM). Before initiating a Range Revision, make sure that SSOM has made the appropriate OM changes. This is critical!

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Notes

In a previous lesson, a Range Revision (RR) was processed where the funds were available to give the employee a salary increase at the time of the revision.

In this next scenario, assume that the funds were not available at the time the employee was eligible for the range revision. You will still initiate the RR Action, but choose no salary adjustment as the reason. You must then execute PA30 Maintain Master Data, infotype 0052-subtype 0100 Wage Maintenance to reserve the balance (enter the amount of the revision, not the entire salary). After funds become available, you will go back to RR and select the appropriate reason. Remember, BEST SSOM must have processed the revision to the Job before you initiate the RR for the employee.

If later, some or all of the funds become available, you will process a series of Range Revisions and PA30s to give the funds to the employee, and reduce the amount of the balance (see the example on the following page).

Instructor Demonstration

• In this demonstration, the Instructor will:

– Create a range revision for a selected employee

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Notes

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #3.4

- ZPAA076 – Range Revision – No Funds Available
- PA30 Maintain Employee Data – Wage Maintenance

OSP has notified you that a range revision for the Accounting Clerk job class and position has been approved. Additionally, you have been notified that both the job class and the position have been changed by Shared Services Organizational Management to reflect the revision from Grade 59 to 61. The range revision increased the compensation range of the position by $1,500.

You have identified that one employee (Emily Stafford) in your Agency was affected by the revision. However, there are no funds for an increase to the employee. The effective date is today. Observe that the employee's grade has already been changed based on the change that SSOM made to the job class. You need to enter the Range Revision and then reserve the balance for the employee.

Initiate Workflow to begin the process.

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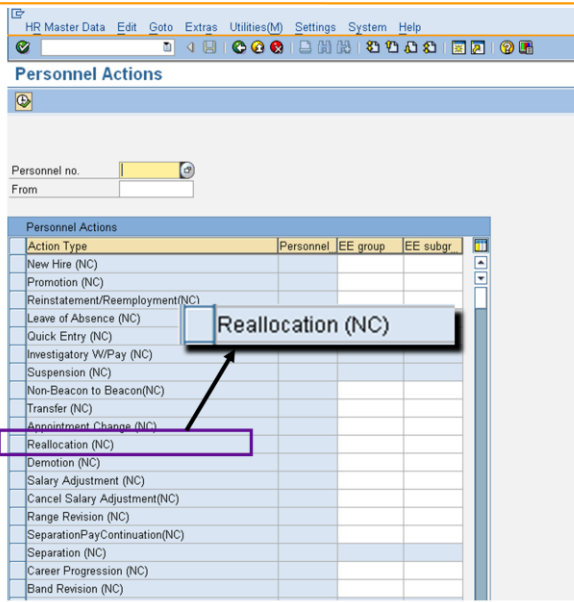
Notes

For example, assume that you put $1,000 in balance for the employee who has a salary of $25,000. A few months later, $500 was available for release. You would initiate the workflow for the Range Revision using the date you were notified that funds were available, not the original Range Revision date. Your reason for the Range Revision would be Range Revision Partial, and the salary amount would be the old salary plus the released reserve, in this example, $25,500. You would then go into PA30 on the infotype 0052-subtype 0100 Wage Maintenance and reduce the balance by that amount. To close infotype 0052, subtype 0100 (to indicate that all funds have been dispersed to the employee), you delimit it using the day after you complete the final action.

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Before you initiate the Range Revision Action, use PA20 to review the employee's current position grade.

Reallocation - Personnel Action

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Notes

Reallocation is the assignment of a position to a different classification, documented through data collection and analysis according to customary professional procedure and approved by the agency HR or OSP.

For purposes of the Salary Adjustment Fund, the following references are considered reallocations:

- Reallocation – assignment of a graded or banded position to a higher level classification to recognize higher level duties.

- Grade-Band Transfer – initial reallocation of graded positions to banded classes where salary increases are required to recognize higher level duties (see the *Career Banding Salary Administration Policy*).

Reasons associated with the Reallocation Action

- Reallocation Up

- Reallocation Inc – After Effective Date Complete

- Reallocation Inc Partial

- Reallocation Down

- Reallocation Horizontal

Reallocation Process

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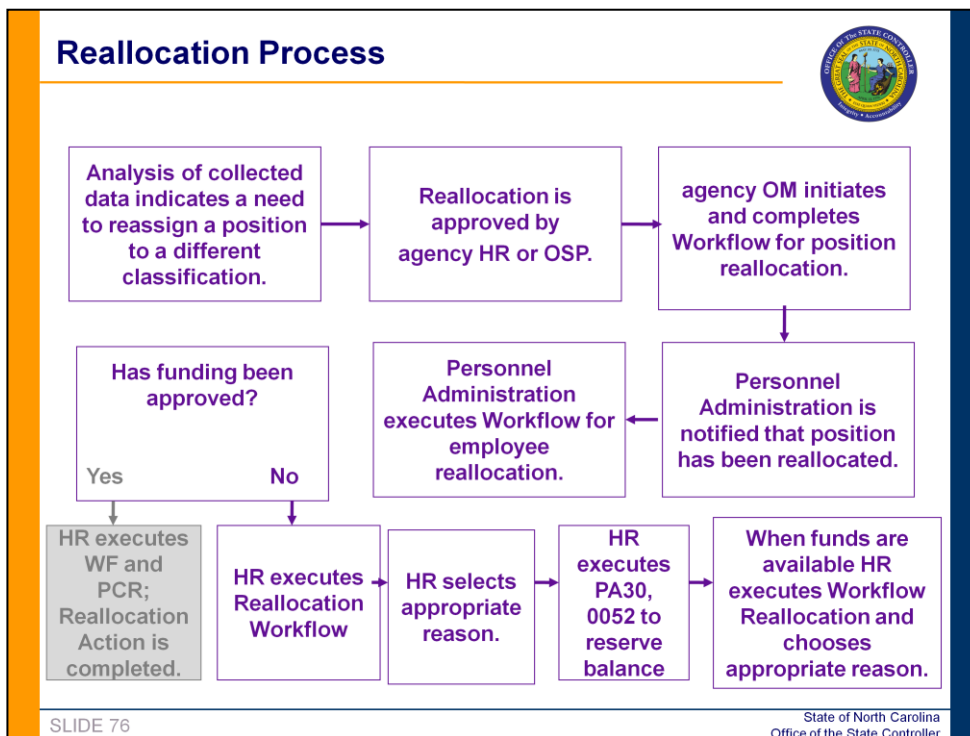
Notes

There are two components to a Reallocation: OM and PA. The agency OM must first initiate Workflow to process the change to the position. This must be done before Personnel Administration initiates the Reallocation Workflow for the employee. In the past you processed a 118 and then a 105; now OM must be completed first.

If funding is available HR PA initiates the Reallocation WF Action with the applicable reason, salary changes are made, and the Action is completed. If funding is *not* available HR PA still initiates the Reallocation WF Action and chooses the appropriate reason for the employee. In this case, HR must then execute **PA30** Maintain Master Data (infotype 0052-subtype 0200 Wage Maintenance) to reserve the balance. Enter the amount of the reallocation, not the entire salary.

If later some of the funds become available, you would process a series of Reallocation WF Actions and PA30s to give the funds to the employee, and reduce the balance. For example, assume that you put $1,500 in reserve for the employee whose annual salary is $25,000. A few months later $500 of the funds are released. You would initiate the WF for the Reallocation funds release date, *not* the original Reallocation date. The Reallocation reason would be Real Inc Partial. On IT0008, the salary amount would be the old salary plus the *released* reserve, in this example $25,500.

The last step is to use PA30 to create infotype 0052-subtype 0200 Wage Maintenance and reduce the reserve balance by the amount released, in our example by $500.

Discussion

- ZPAA076 – Reallocation

You will not perform an exercise for Reallocation.

The instructor will walk through the steps with you (see the Exercise Guide). The steps for Reallocation are very similar to the ones you performed in the Range Revision, with the obvious difference of the Action and Reasons. In Reallocation, Best Shared Services must make changes to the *position* before you can do the Reallocation Action (in Range Revision, Best Shared Services made changes to the *job classification* prior to the PA Action).

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Notes

Before executing the Workflow PCR, verify the employee's current grade. Use transaction code PA20 to view the Basic Pay (0008) infotype. The current grade should be 62.

When processing the Range Revision Action, observe on the PCR that the employee's grade has already been changed. That change is a result of the Job change made by BEST Shared Services, Organization Management (SSOM). Before initiating a Range Revision, make sure that SSOM has made the appropriate OM changes. This is critical!

Use the data assigned in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Lesson Review

In this lesson you learned to:

- Distinguish between making a salary adjustment, appointment change, and a range revision

- Identify the Job adjustment that must be made prior to making a range revision

- Describe the difference between a range revision when funds are available and no funds are available

- Explain the Reallocation process

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Notes

Course Map

- Lesson 1: Review of PA Infotypes
- Lesson 2: Introduction to Actions
- Lesson 3: Entering Employees into SAP
- Lesson 4: Adjusting Salaries
- **Lesson 5: Promoting Employees**
- Lesson 6: Separating Employees
- Lesson 7: Entering Transfers
- Lesson 8: Reviewing Additional Actions
- Lesson 8: Course Review

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Notes

Lesson Objectives

After completing this lesson you should be able to:

- Promote an employee

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Notes

Notes

A **Promotion** is a change in status to a higher salary grade Position. A promotion also results in an increase in salary, in accordance with the State Promotion Policy.

Promotion Process

Funded, established Position exists; Position is vacant or pending vacancy.	Position is posted.	Interviews are conducted.
HR gathers additional information if applicable.	Manager or supervisor sends employee data to HR.	Offer is made and accepted.
HR initiates BEACON SAP approval workflow.	HR receives approval, via Inbox and executes PCR.	HR executes Promotion Action.

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Notes

Several steps must take place before a Promotion Action is executed in OSC HR/Payroll SAP.

First, a funded and established Position must exist. The Position is either vacant, or there is official notification that a vacancy is pending (for example, an employee has submitted his or her resignation).

The Position must be posted in accordance with State policy. After the posting time frame has expired, all qualified candidates are interviewed and a qualified candidate is selected. After the candidate receives and accepts the promotion offer, the Manager or Supervisor sends the employee information to HR, using a variety of distribution methods (i.e. manual form, email, phone call, fax, or other method).

HR gathers any additional information and initiates the OSC HR/Payroll SAP approval workflow. After the approval is received via Inbox, HR executes the PCR and the Promotion Action.

Reasons for Promotion
- Promotion
- Promotion Inc-After Eff Date
- Acting Promotion

Instructor Demonstration

- In this demonstration, the Instructor will:
  - Promote a current employee to a vacant Position at a higher level
  - Increase the employee's salary

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Notes

During the Promotion Action process, OSC HR/Payroll SAP prompts you to select the following:

- Create a vacancy for the Position the employee held prior to being promoted. Select **Yes**.

- Delimit the vacancy on the Position to which you are promoting the employee. Select **Yes**.

You should also be aware that the work schedule will default from the Position. You should change the work schedule based on the approved schedule *if* it is different from the one listed. The default work schedule is based on information provided by your Agency and by OSC HR/Payroll team members. It is important to review this work schedule for correctness, including the working hours.

Watch the Instructor complete the Action. The Instructor will demonstrate using the student scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

Exercise #4.1

• Promotion

The supervisor for Karla Hart is promoting her from an Informational & Communications Spec I position to an Informational & Communications Spec II position. The promotion will be effective as of the 15th of the next month. The accompanying pay increase is in accordance with State policy. The new salary is the minimum of the new position. Process the promotion in SAP.

Don't forget! You must have reinstated the Karla Hart assigned to you in a previous exercise before you can promote her. Before you begin, use PA20 to view the Actions infotype to make sure that the Karla Hart assigned to you indicates "Reinstated" as her last action.

Initiate Workflow to begin the process.

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Notes

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

Lesson Review

In this lesson you learned to:

- Promote an employee

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

After completing this lesson, you should be able to:

- Distinguish between the two types of separation
- Identify when it is appropriate to use each type of separation
- Separate employees

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Notes

Two Types of Separation

- **Separation Pay Continuation**
  - Retirement: Law Enforcement Officer supplement (retire before age 62)
  - Reduction in Force (RIF): Severance and/or health insurance
  - RIF: Discontinued Service Retirement
  - Separation: Short-Term Disability

- **Separation**
  - All other employees not listed in the Separation Pay Continuation Action

- **Save** the Cost Distribution infotype

Note: Verify that time evaluation has run, that balances are accurate and that all time has been entered, released and approved

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Notes

Two Actions involve employee separation: Separation Pay Continuation and Separation. It is important to determine which Separation Action is appropriate. Before entering either type of separation, make sure that (1) time evaluation has been run (Hint: Use PA20 transaction to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run), and (2) time balances are accurate.

Separation with Pay Continuation is used only for:

- *Retirement* - Law Enforcement Supplement for Law Enforcement Officers (LEOs) who retire before age 62. You will use the other Separation after age 62.
- *Reduction-in-Force (RIF)* – Severance and/or health insurance
- *RIF* – Discontinued Service Retirement
- *Separation Short-Term Disability*

Separation is used for all employees who do not qualify under the Separation with Pay Continuation Action.

Cost Distribution Infotype (0027). This infotype is assigned to every position. When an employee is separated, the position defaults to 99999999; therefore no cost distribution is assigned. During both types of Separation, **save** the infotype so that it is assigned to the person. This infotype allows you to create a payout to an employee if needed after the separation. If the Cost Distribution infotype has not been saved, the payout cannot be processed. If the employee returns to work later, **delimit** the infotype during the Reinstatement.

Notes

Before processing a Separation, you should ensure that all time sheets have been entered, approved and released. If the timesheets are not up-to-date, correct, approved, and released you cannot enter the payout of leave during the Separation Action. When this happens, you will complete the Separation by-passing the leave payout infotype. When the timesheet has been run and released, you will use PA30 to create *Time Quota Compensation* (0416) to payout the employee's applicable leave.

NOTE: The Separation Action automatically converts the direct deposit to a check. It is important to ensure that the address is correct prior to entering the Separation into OSC HR/Payroll SAP.

Separation Effective Date

- **State of North Carolina definition**
  - The last day you are *still* an employee.

- **OSC HR/Payroll SAP definition**
  - The first day you are *no longer* an employee. OSC HR/Payroll SAP automatically adds one day to the last day worked within the Action.

- **Enter last date worked as effective date on Workflow**
  - Do not add a day

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Notes

Separation effective date

The State of North Carolina defines your effective separation date as the last day you are *still* an employee. OSC HR/Payroll SAP defines it as the first day you are *no longer* an employee.

On the Workflow (WF) Employee Action Request, enter the last day worked (or on payroll if retiree)--do not add a day. OSC HR/Payroll SAP automatically adds one day to the last day worked within the Action. Examples: The employee is separating for personal reasons and the last day worked is 8/25/2008. The effective date is 8/25/2008. Or, the employee is retiring effective 9/1/2008. The employee's last day worked is 8/28/2008, because he or she is exhausting vacation the remainder of the month. The effective date will be 8/31/2008. The last day worked would be 8/28/2008.

After you receive the WF approval PCR, enter the last day worked as the effective date on the Personnel Actions screen in OSC HR/Payroll . Beginning with the next screen, *0000-Copy Actions*, OSC HR/Payroll has already added one day to the date you entered on all subsequent infotypes within the Action. Save the infotypes and **do not** change the dates **until** you get to infotype *0416-Create Time Quota Compensation* (you only receive this infotype if you have leave payout). **Change** the date on that **one** infotype (0416) to reflect the same date as the effective date of the Action. **If you change the dates on any infotype except 0416, the employee will not receive the last day of pay. See example on the next page.**

Separation Effective Date Example

- **Employee's last date worked is 8/31/2008**
  - Enter 8/31/2008 on Workflow (do not add a day)
- **Workflow approval PCR is received**
  - Enter 8/31/2008 on Personnel Action screen
  - Execute
- **OSC HR/Payroll** adds one day to all remaining infotypes (9/1/2008)
  - Only change the date on the Time Quota Compensation infotype (only displays if you select subtype for leave payout)
    - Change Time Quota Compensation to reflect same date as Personnel Action (8/31/2008)

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Notes

1. Last date worked is 8/31/2008, which is entered on the WF Employee Action Request. Be sure to enter the same date in "Last Day Worked" (see previous page if retiree).
2. After receiving the WF approval, enter 8/31/2008 on the Personnel Actions Screen (PA), select the Action and Execute.
3. Copy Actions (0000) is displayed with a date of 9/1/2008. **Do not change** the date. Enter the reason for the Action (if Separation Pay Continuation, change the position number to 99999999 and use the Assignment button). **Save** the infotype.
4. Enter to by-pass the delimit message, and click **Yes** to create vacancy.
5. Copy Organizational Assignment (0001) is displayed. **Do not change** the date. **Save** the infotype.
6. Change Date Specifications (0041) is displayed. **Do not change** the date. **Verify** the last day worked is accurate. **Save** the infotype.
7. Create Cost Distributions (0027) is displayed. **Do not change** the date. **Save** the infotype.
8. Infotypes for infotype Time Quota Compensation is displayed. Perform either (a) or (b) as described below:
   (a) If no payout, close the pop-up.
   (b) If payout, **Select** the appropriate subtype. Time Quota Compensation is displayed. **Change the date** to reflect the same date as the effective date of the Action (in our example, 8/31/2008). **Enter** the number of hours of payout. **Save.**
9. Delimit Objects on Loan (0040). **Do not change** the date. **Delimit the applicable items** and **Save** the infotype.
10. Click the Back button when automatically returned to the PA screen.
11. Click the Complete Workflow Item button.

Separation

Manager or supervisor notifies HR of separation. → HR receives employee data and gathers additional information if needed. → HR initiates approval Workflow in OSC HR/Payroll SAP.

HR executes Separation Action. ← HR receives approval via Inbox and executes PCR.

Note: When you use the separation reason *Beacon to Non Beacon* (see below), OSC HR/Payroll SAP automatically stops pro-rated longevity by running the Time Transfer Specifications (2012) infotype in the background. After you separate an employee using the Beacon to Non Beacon reason, you should use PA20 to view 2012.

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Reasons for Separation

- Better Employment
- Personal Reasons
- Involuntary Separation
- Did Not Report
- Voluntary Resigned Without Notice
- Reduction in Force (RIF)
- No Reason Given
- Long Term Disability
- Retirement
- Retirement Disability
- Contract Ended
- Time-Limited Appt Term
- Supplemental Appt Term
- Appointment Ended
- Not Re-Elected
- Dismissed – Gross Inefficiency

- Dismissed – Conduct
- Dismissed – Unsatisfactory Performance
- RIF – Prior to career status
- Prior to achieving perm status
- Pay in lieu of notice
- Death
- Other
- Terminate while on FMLA
- Beacon to Non-Beacon Agency (pro-rate longevity will not be paid—see note on slide above)
- Cancel Sep Pay Continuation

Exercise #5.1

- Separation

Nicole Ahrens has informed you that the 15th of next month is the last day she will work. She is resigning effective that day for personal reasons and has leave that needs to be paid out. As you enter the Separation Action, you should remember to delimit any items on loan that the employee returned. If the employee has not returned the items on loan, but you need to process the Action in order to get him or her off payroll, you can go ahead and complete the Separation Action, but in that case, do not delimit the items on loan. You should then complete a PA30 on Monitoring of Tasks (0019) to create a reminder to retrieve the items. For this exercise, assume you have:

- ensured that time evaluations have been run

- verified that the time balances are accurate

Initiate Workflow to begin the process.

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Notes

Use the data in the Data Guide to complete the exercise. Use eAssistant for step-by-step instructions.

NOTE: If the employee has not returned the items on loan you will not delimit those items, but you should make an entry in PA30 on **Monitoring of Tasks** to enter a reminder to follow up and retrieve items.

Separation Pay Continuation-Personnel Action

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Notes

Important! When Separation Pay Continuation is used, the pay continuation is for a specified time frame; therefore, eventually, a "regular" Separation Action must be performed at that time.

In the next two exercises, you will process an Action combined with a PA30 – Maintain Employee Data.

When you process a Separation Pay Continuation, there are two manual entries that must be made while processing the approved PCR. These entries are not necessary in a "regular" Separation. Those two entries are:

- Enter 99999999 on IT0000 – Actions in the position field
- Click the Assignment button on IT0001 – Organizational Assignment and enter the Org Unit number of the highest level of the Organizational Unit to which you have permission. Failure to perform this last step will prevent you from entering the Separation at the appropriate time.

Separation Pay Continuation

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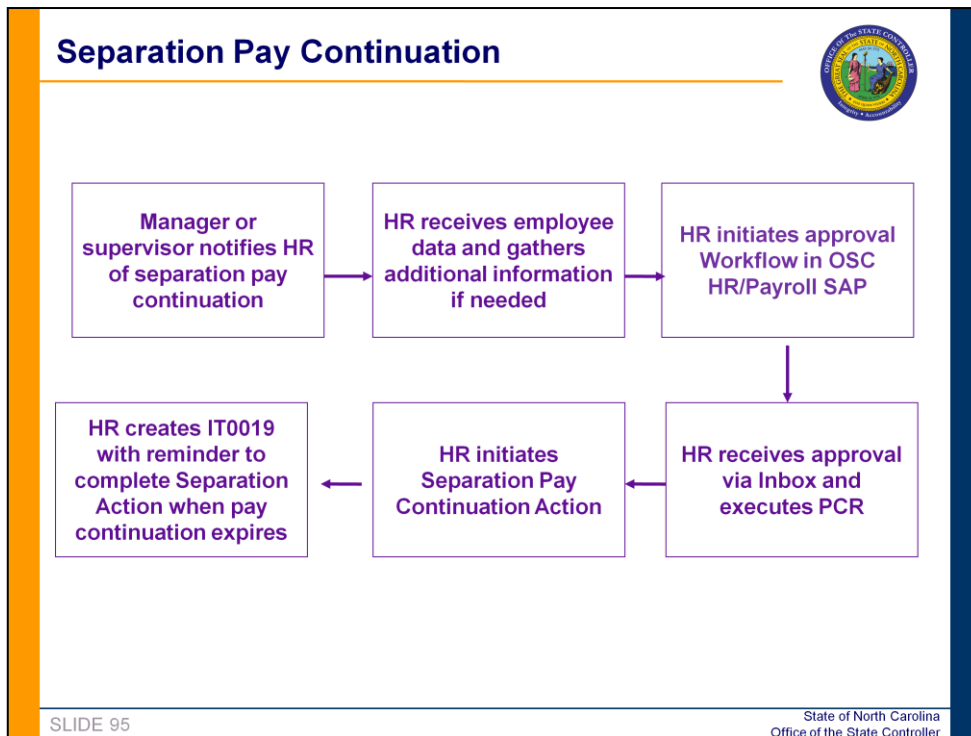
Reasons for Separation Pay Continuation Action

Notes

- Retirement (Law Enforcement Supplement who retires prior to age 62) *
- Reduction in Force (RIF) – Severance and/or health insurance
- RIF – Discontinued Service Retirement
- Separation Short-Term Disability

If the employee does not meet all of these criteria, then the *Separation* Action, rather than the *Separation Pay Continuation* Action, is the appropriate one to use for the separation. **Note**: *The employee must be a sworn, certified (Basic Law Enforcement Training) law enforcement officer, a participant in the Law Enforcement Retirement Program, and has served at least half of his or her time in State service in a qualified law enforcement Position.

Caution! You **only** use the Separation Pay Continuation for qualified law enforcement officers who are retiring **prior** to their 62nd birthday. If they are retiring on or after 62, you will use the Separation Action.

Also, if you determine that the Separation Pay Continuation is the appropriate Action, you must go to PA30 and enter a Monitoring of Tasks (0019) to remind you when the continuation ends. In the law enforcement retirement example, the effective date is the **last day of the month of the employee's 62nd birthday**. Enter the effective date, with a reminder 2-3 weeks prior that you must complete a regular Separation. This process may be automated in the future.

Exercise #5.2

- Separation Pay Continuation

Inez Hayes has been downsized and will receive severance for 4 months. In addition, Inez has vacation that needs to be paid out at the time of the Separation Pay Continuation Action

Initiate Workflow to begin the process.

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Notes

Use the ZSEV Severance Pay Calculations report for projected calculations for RIF. Access the *Severance_Pay_Calculations* job aid on BEACON Help.
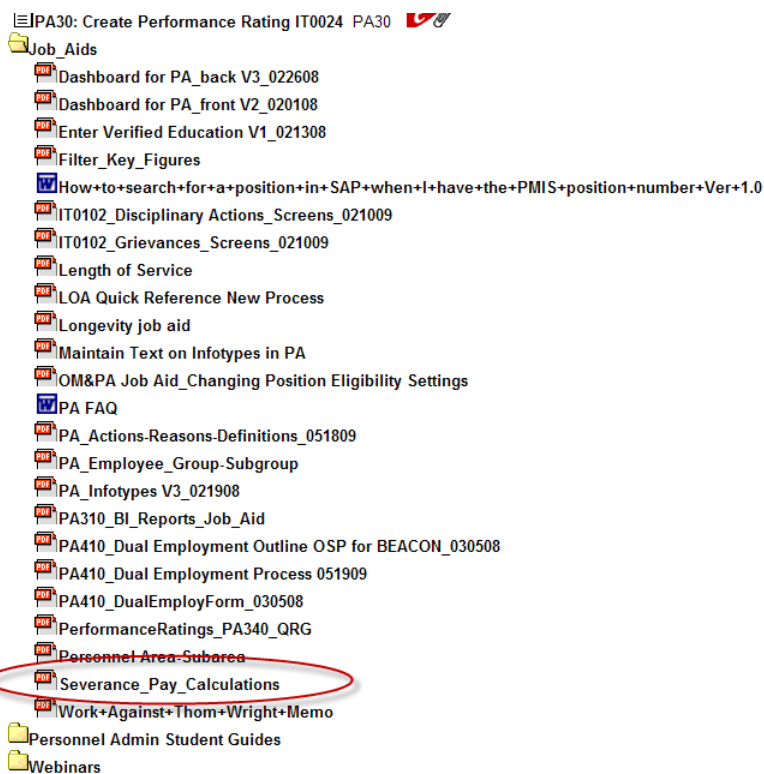
Lesson Review

In this lesson you learned to:

- Distinguish between the two types of separation
- Identify when it is appropriate to use each type of separation
- Separate employees

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:
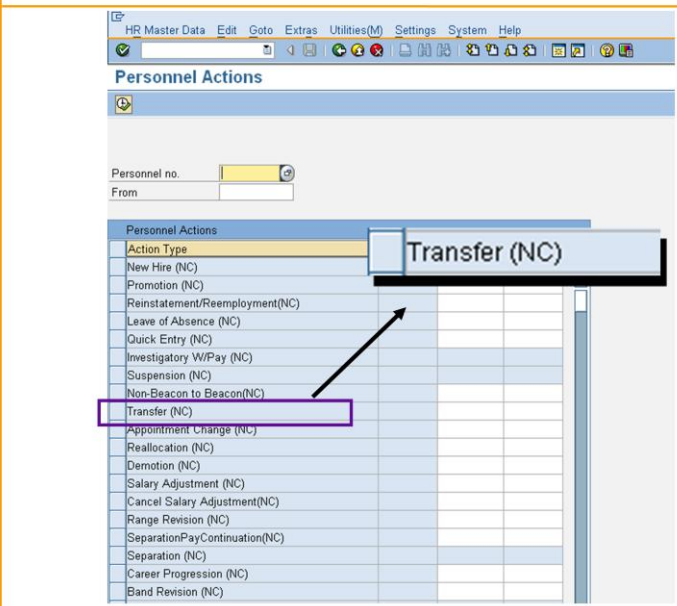
- Transfer an employee within an agency

- Transfer an employee from one OSC HR/Payroll agency to a different OSC HR/Payroll agency

- Promote an employee

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Notes

Notes

If your security access permits, you can see some of the information concerning employees in other agencies. Run the *BI Verify Employment Report (B0157)* to verify the employee's information.

Reasons associated with the Transfer Action

- Agency to Agency – Lateral
- Agency to Agency – Promotion
- Agency to Agency – Reassignment
- Within Agency – Lateral
- Within Agency – Reassignment
- Grade-Band Transfer

Transfer

SAP employee accepts a SAP transfer offer. → Manager or supervisor notifies HR and sends employee data. → HR receives employee data; gathers additional info as needed.

HR executes Transfer Action. ← HR receives approval via Inbox and executes PCR. ← HR initiates approval Workflow in OSC HR/Payroll SAP.

Full security for both Agencies?

Yes → Complete all infotypes within the Action

No → Complete partial infotypes within the Action and finish using PA30

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Notes

A Transfer Action is used to move an employee from one position to another within the present SAP agency or between SAP agencies without a break in service.

Normally a transfer between agencies results in an employee reporting to work in the Receiving agency the first workday following the separation date from the Leaving agency. The Leaving agency does not separate the employee in OSC HR/Payroll; however, the Leaving agency should delimit any items on loan that the employee returned. If the Leaving agency does not delimit the items on loan, the Receiving agency can delimit them at the time of transfer (assuming the employee actually returned the items).

Two ways to process a Transfer in OSC HR/Payroll SAP.

There is only one Transfer Action in OSC HR/Payroll ; however, you may process transfers in one of two ways, depending upon your security access. If you have security access for:

• both the *Leaving* agency and the *Receiving* agency, OSC HR/Payroll SAP allows you to complete all of the infotypes during the Transfer Action.

• only the Receiving agency, OSC HR/Payroll SAP allows you to partially complete the Action. In the latter case, you will use PA30 to complete the infotypes.

Exercise #6.1

• Transfer - Within agency - Lateral

Helen Stephens is an Office Assistant IV with Cultural Resources in the CR CDS MOA organizational unit. She is making a lateral transfer to the CR CDS MOA Educational Service org unit with no change in salary. She is currently a full time, subject FLSA employee. The effective date is today. At the new agency, she received a cell phone.

In this scenario, you have full security access to both Agencies.

Initiate Workflow to begin the process.

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Notes

Whether you are the Leaving agency (LA) or the Receiving agency (RA), you should contact each other to discuss the transfer before processing in OSC HR/Payroll. When the employee indicates he or she is leaving, the agency should inquire if the employee is going to another agency. If the response is yes, the LA does not separate the employee or enter any *actions* in SAP because as soon as the RA enters the Transfer Action, the employee is automatically transferred out of the LA. The LA only:
  • ensures time has been entered, released and approved before time eval runs
  • delimits objects on loan (using PA30) that the employee returned
  • verifies accuracy of leave accruals
  • discusses overtime comp with the employee (only paid if S-FLSA-OT; otherwise lost if not used within OT comp aging period).

The RA discusses above bullet points with LA and reviews the *Verify Employment Report B0157* to verify information. The RA does not create a New Hire Action, but uses the Transfer Action with the appropriate reason.

If the transfer moves the *employee type* to a different *employee type*, you must change the Employee Subgroup. If the employee is going from one *payroll type* to a different *payroll type*, you will only initiate the PCR and when it is approved, contact BEST.

Unless the employee is assigned to a position that entitles him or her to a different retirement program, the RA does not enroll the employee, since the record will transfer from the LA.

Either agency can use PA20 to view the IT0003 for the employee. The PDC recalculation date represents the last time eval has been run.

Exercise #6.2

• Transfer - Agency to Agency - Promotion

Marsha Sanders is being promoted from Facility Survey Consultant I at the Department of Health and Human Services to a Facility Planner III in Cultural Resources in the CR CDS Capital Projects Unit Org unit.

In this scenario, you only have security access for the Receiving agency.

Initiate Workflow to begin the process.

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Notes

In this exercise, you will process some of the infotypes within the Action, and complete the remaining infotypes in PA30.

Lesson Review

In this lesson you learned to:

- Transfer an employee within an agency
- Transfer an employee from one SAP to a different SAP agency
- Promote an employee

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 7: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the Work Against process
- Describe Dual Employment
- Identify additional Actions:
    - Demotion
    - Investigatory w/Pay
    - Suspension
    - Cancel Salary Adjustment
    - Career Progression

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Notes

There are several more Actions available in OSC HR/Payroll than you have had the opportunity to practice in this class. One of those, Leave of Absence is discussed in detail in the *PA420 Leave of Absence* class.

The remaining Actions (listed above) are briefly discussed in this lesson.

Notes

A **Work Against** can be used during many of the Personnel Administration Actions, including New Hire, Promotion, Reinstatement, Non-BEACON to BEACON, and Transfer. Specific rules for using Work Against are details on the following pages.

The rules for Work Against are available in the *Thom Wright Work Against* memo from the Office of State Personnel.

The rules for OSC HR/Payroll Work Against are explained in the above mentioned memo. In the past there have been vast differences in the understanding and application of Work Against. You should review the OSC HR/Payroll rules in depth to ensure that your agency consistently follows the guidelines. You may access the *Thom Wright Work Against* memo online at the OSP website and BEACON University, under HR, PA, Job Aids.

Personnel Administration Work Against Process

Employee accepts applicable Action → Manager or supervisor notifies HR and sends employee data → HR receives employee data; gathers additional info as needed

HR executes applicable Action for employee and chooses Work Against for reason ← HR receives approval via Inbox and executes PCR ← HR initiates approval Workflow in SAP (adds working title in attached comments)

HR completes the Work Item; data is live in SAP → BEST Shared Services receives Work Against PCR via Inbox

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Notes

The various complexities of a OSC HR/Payroll Work Against are outlined and described below and on the following pages.

The OSC HR/Payroll SAP employee group and subgroup are used to designate the employee type: Employees are no longer hired into positions that are titled specifically to describe the employee type. For example, there are no longer position titles with the words *trainee, temporary, intern, or probationary,* etc, as part of the title. Positions are named by the Job Classification title by default (Engineer I, Engineer II). The employee subgroup is changed to reflect if the employee is a *trainee, probationary, time limited, grant, or temporary* employee.

The employee and the position must have the same supervisor: Whether the WA is for one or more employees assigned to a position, the employees and the position must report to the same supervisor. (The employee holds the position and the employee's position reports to the supervisor's position.)

The employee record (HR Personnel Administration) must be updated in conjunction with the position record (BEST Shared Services): There is only one PA Workflow for WA, however, that one Workflow involves two separate components: PA (employee) and OM (position). You must complete the PA (employee) component of the Workflow first. Upon selecting the WA checkbox on the PA Workflow and completing the PA Action, the PCR automatically routes to the BEST Inbox   BEST must make changes to the position object name (title) based on the Work Against Workflow that you submitted.

BEST Shared Services Work Against Process

continued from previous page → BEST Shared Services receives Work Against PCR via Inbox. → BEST Shared Services selects PCR and views the Attachment list and note.

BEST Shared Services completes Copy Object infotype for position changing title to include prefix W/A. ← BEST Shared Services closes the PCR; then reopens. ← The work against title displays.

Best Shared Services completes Work Item.

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Notes

The position title should include the initials *W/A* as a prefix: The position object name (title) is changed to include the prefix *W/A.* HR PA indicates the Work Against title by using the Services for Object button when creating the initial Workflow. BEST Shared Services accesses the Attachments note option to copy the Work Against title. Changing the position with this prefix ensures that reports accurately reflect all of the employees who are assigned to Work Against positions.

The position title field will store the Work Against (W/A) title (employee working title) in work against situations. For example, an Engineer II working against an Engineer III would be handled as follows:

- Job Class Title: Engineer III
- Position Title before W/A Action: Engineer III
- Notes in PA PCR indicate employee is working as an Engineer II against the Engineer III
- Shared Services modifies the Position Title to reflect the W/A Engineer II
- BI reports would reflect:
  - Job Title: Engineer III (does not change)
  - Position Title: W/A Engineer II (this is now the title of the Engineer III position)

BEST Shared Services Work Against Process (con't)

repeated from previous page → BEST Shared Services receives Work Against PCR via Inbox. → BEST Shared Services selects PCR and views the Attachment list and note. → The work against title displays. → BEST Shared Services closes the PCR; then reopens. → BEST Shared Services completes Copy Object infotype for position changing title to include prefix W/A. → Best Shared Services completes Work Item.

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Notes

A bona fide and approved job class must be used: You cannot use an informal working title as the position title of a Work Against. The position title must be an official job (class) title. For example, Engineer IV is a valid job title. Therefore, an employee can work against an Engineer IV position, but the employee could not work against a "Safety Engineer" position. The title the employee is working against should be entered in the Notes attached to the PCR as previously described.

The timing of the employee record update and the position update must be coordinated to ensure consistency in data records: In order for the employee's record to be correct, you must enter a Work Against with an understanding that BEST Shared Services must also complete information before the Work Against is complete. For example, if you enter a Work Against at 4:30 pm and BEST Shared Services does not receive and process it until late in the afternoon of the following day, the employee's record has shown an incorrect position title during that time. A best practice is to initiate your Work Against early each morning in order to ensure that BEST Shared Services has enough time to receive and process the necessary position revisions.

Examples of Correct Work Against Usage

- An Office of State Personnel (OSP) review lowers the employee title and grade (through no fault of the employee).
- Job Sharing - hire two or more employees to work against a bona fide position by following specific rules.

Continued…

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Notes

An OSP review lowers employee title and grade (through no fault of the employee): After a review by OSP the duties of an employee are determined to be consistent with a title and grade level lower than the one the employee currently holds. Because the lower title and grade level were through no fault of the employee he or she will be allowed to work against the current title and grade, while the position title and grade will be changed to the lower levels. Example: The employee is currently working as an Environmental Program Manager III, at an 86 grade level. After the review, the position is changed to an Environmental Program Manager I position at an 82 grade level. As long as the employee remains in the position he or she will work against the Environmental Program Manager III position, grade level 86. When the employee leaves the position the agency will recruit for the correct position (Environmental Program Manager I, grade 82 in our example).

Hire two or more employees to work against a bona fide position (example: job sharing): You can hire two or more employees to work against a position that is a bona fide and approved job title. The salary, appointment type and work schedule for each of the employees may be the same or may be different from each other. However, when hiring two or more employees to work against a position you must follow these additional rules:

- The total cannot exceed one full-time equivalent position.

- The combined salary of the employees cannot exceed the total amount budgeted for the position.

- The classification, supervisor and all other attributes must be the same for all employees working against the position.

Examples of Correct Work Against Usage *(continued)*

- Despite your best recruiting efforts, you have not been able to fill a bona fide position.
- The position for which the employee will work against must be moved to the org unit of the employee's supervisor.

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Notes

Despite your best recruiting efforts you have not been able to fill a bona fide position: You have an open position that is a bona fide and approved job title. Despite your best recruiting efforts you have not been able to fill that position. You can hire an employee to work against that position, as long as the person you are hiring and the position both report to the same supervisor.

Position moved to report to Supervisor
If the position to which an employee will be working against does not report to the employee's supervisor, the W/A position will have to be moved. The W/A position must belong to the same org unit as the supervisor's position with the supervisor's position designated as the supervisor of the employee's W/A position.

Dual Employment

Dual Employment – four scenarios:
1. SAP to SAP (ITS to REVENUE)
2. SAP Employee Performing Dual Employment at Non-SAP agency (DOT to NCSU)
3. Non-SAP to SAP (NCSU to DOT)
4. Non-SAP to Non-SAP (NCSU to UNC)

Agency responsibility:
• Parent agency must be aware of benefits consequences for any employee who accepts dual employment
• Parent and Borrowing agency must sign agreement prior to employee accepting dual employment

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Notes

There are basically four scenarios to use dual employment (see list above).

All dual employment (except Quick Entry) will be processed by BEST Shared Services. The information in this lesson is to provide you with a basic understanding of the processes and policies. When dual employment involves a non-BEACON to BEACON agency, SAP agency HR will execute a Quick Entry Action to assign the employee to the position. When the dual employment involves a SAP to SAP agency, BEST Shared Services will assign the holder (employee) to the position and then create infotype 554 – Hourly Rate per Assignment on the employee.

Because OSC HR/Payroll is an integrated system, time, benefits and payroll are all affected by dual employment (unless the employee is hired into the borrowing agency as a temporary). In OSC HR/Payroll, the hours of both jobs are combined to determine benefits and time. That is why it is important for the Parent and Borrowing agency to sign the agreement **before** the employee begins working dual employment.

The Parent agency must now be aware that if one of its employees works dual employment and becomes eligible for benefits (based on extra hours worked), there will be a cost to the Parent agency. In the past, the number of hours the employee worked at the borrowing agency did not matter.

For details, see the *Dual Employment Process, Dual Employment Procedures for Agencies*, and the *Dual Employment Agreement* located online at BEACON University, under HR, PA, Job Aids.

Dual Employment - Time and Overtime

- Dual Employment employees are changed to positive time.
  - Best Shared Services enters dual employee time
- Overtime as a result of additional work shall be paid. Compensatory time cannot be given.
- Overtime shall be paid by the agency where the overtime occurs.
- The borrowing agency is responsible to work with the parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA.
- Comp time earned prior to dual employment can be taken at either agency.

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Notes

Time

Employees are changed to positive time when performing Dual Employment. BEST Shared Services will enter the employee's time.

Overtime

– When overtime occurs as a result of additional work, it shall be paid. Compensatory time cannot be given.

– Overtime shall be paid by the agency where the overtime occurs. This is based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.

– It is the responsibility of the Borrowing agency to work with the Parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA. To calculate "premium rate ," add hourly rates including all non-discretionary payments (i.e. Shift premium, weekend premium) and divide by standard hours.

Comp Time Agreement of Both Agencies

Both agencies shall agree that comp time earned prior to the Dual Employment Agreement as well as leave can be taken in either agency, not just the agency where earned.

Ending a Dual Employment

The agency submits the Separation form to BEST requesting termination of services. The form may be accessed from the BEST website.

Dual Employment Policies - Miscellaneous

- Payment to the Parent agency – The OSC HR/Payroll system will charge the payment to the appropriate salary account
- Workers' Compensation – entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.)

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Notes

Payment to the Parent Agency - If both agencies are under the OSC HR/Payroll System, it will no longer be necessary to send a check to the Parent agency. The OSC HR/Payroll system will automatically charge the payment to the appropriate salary account as shown on the approved Dual Employment Form. The employee receives one direct deposit (paycheck).

Workers' Compensation - When an employee who holds two separate jobs, is injured in one of them, the employee's Workers' Compensation entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.) Over 40 hours paid - weighted average. Average weekly wage will be manually calculated and provided to the Workers' Compensation specialist.

CP30

- A CP30 form is only needed in two circumstances:
  - The employee is due pre-SAP wages from dual employment that should have been paid prior to go live
  - The employee is working at an agency that is outside of SAP (for example, University)

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Notes

As indicated above, there are only two circumstances when a CP30 is needed. When the situation warrants a CP30, it is only sent to BEST by the OSC HR/Payroll agency who received the funds. The CP30 is not sent by the employee nor by the secondary agency. When the parent agency sends the CP30 to BEST, that agency is verifying that funds are available. The parent agency ensures that the CP30 is only sent to BEST one time.; therefore if the agency emailed the CP30, it does not need to then fax the form as well. Sending a CP30 in for an employee more than once increases the likelihood that the employee may be paid more than once.

The employee completes a paper time sheet at the second agency which is signed and approved by the supervisor. The time sheet should have the hourly rate, the position number and contain the words "Dual Employment". The time sheet is sent to BEST who will enter the time for the secondary position. The employee enters time as usual for the primary position.

Dual Employment Policies - Examples

- Permanent full-time or permanent part-time employee working temporary in another agency
- Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week
- Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week

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Below are examples of how dual employment affects benefits and time:

Permanent full-time (FT) or permanent part-time (PT) employee working temporary in another agency: A typical dual employment situation involves a permanent FT or PT employee in one agency doing temporary work for another agency and typically paid a flat amount either in a lump sum or monthly over the course of employment (it may also be an hourly rate). Benefits are paid by the full-time, 30 - hour or more position.

Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week: Handle as regular dual employment. The benefits involved are leave, NC Flex, 457 Savings Plan. If the employee works as much as 20 hours per week in one agency, the employee is entitled to leave benefits in that agency. The leave accrual and usage will have to be based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.

Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week: This type is different from other dual employment. The same approval is required; however, Parent agency must be willing to pay its share of benefits. In this situation the employee would be eligible for full benefits. Both agencies must be willing to pay their pro rata share of retirement, health insurance, etc. If this arrangement cannot be worked out then the additional employment must be as a *temporary* appointment. Parent agency owns the one leave record. Borrowing agency sends paper copy of timesheet to Parent agency so that Parent agency can bill Borrowing agency. If Parent agency is in SAP the time sheet is forwarded to BEST Shared Services for entry.

Demotion

Reasons for Demotion:

- Personal Conduct – Position
- Gross Inefficiency – Position
- Unsatisfactory Performance – Position
- Personal Conduct – Job Reallocation
- Gross Inefficiency – Job Reallocation
- Unsatisfactory Performance – Job Reallocation
- Personal Conduct – Salary
- Gross Inefficiency – Salary
- Unsatisfactory Performance - Salary

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Notes

Demotion is a change in status resulting from assignment to a position assigned a lower salary grade. The action is a demotion if the change in status results from inefficiency in performance or as a disciplinary action. All necessary disciplinary paperwork must be approved prior to the demotion process by the appropriate authorities.

Either skip or delimit the objects on loan depending upon your agency's policy.

Investigatory w/Pay

Reasons for Investigatory w/Pay

- Investigatory Placement Leave
- Extended

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Investigatory with Pay

An employee may be placed on Investigatory Status with Pay to allow the agency adequate time to investigate the validity of the allegations of unsatisfactory performance/unsatisfactory conduct. If allegations are confirmed, the agency will determine what further disciplinary action may be warranted.

When an employee is placed on leave with pay, his/her leave balance is not used. Code 9540 - *Other Manager's Approved Leave* should be entered on the timesheet. Follow agency policy for approvals.

Use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy.

Suspension

Reasons for Suspension;

- Conduct
- Unsatisfactory Performance
- Gross Inefficiency

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Notes

Suspension

The removal of an employee from work for disciplinary reasons *without paying* the employee.

Since it is presumed that the employee will return to work you would use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy. Follow your agency policy for approvals.

Cancel Salary Adjustment

Reasons for Cancel Salary Adjustment:

- Cancel Salary Adjustment
- Cancel Acting Pay/Promotion
- Cancel Lead Adjustment
- Cancel In-range Adjustment
- Cancel Geographic Differential
- Cancel Site Differential
- Cancel CGRA
- Cancel Legislative Increase
- Cancel Career Progression
- Cancel LEO Sworn

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Notes

Cancel Salary Adjustment

A **Cancel Salary Adjustment** is a decrease in an employee's salary within the employee's current salary range and within the agency where the employee is currently employed.

The same reasons that existed to give an employee a salary adjustment also exist to cancel the adjustment (with the obvious exception that the word *cancel* precedes it). For example, you give an employee an *acting pay* salary adjustment and then decide to cancel the action by selecting *Cancel Acting Pay*.

Reasons associated with the Career Progression Action

- Grade-Band Transfer
- CP-Comp/Skill
- CP-Labor Market
- CP-Comp Level Change
- Broad Band Level change
- Broad Band Job change
- Broad Band Salary Adjustment
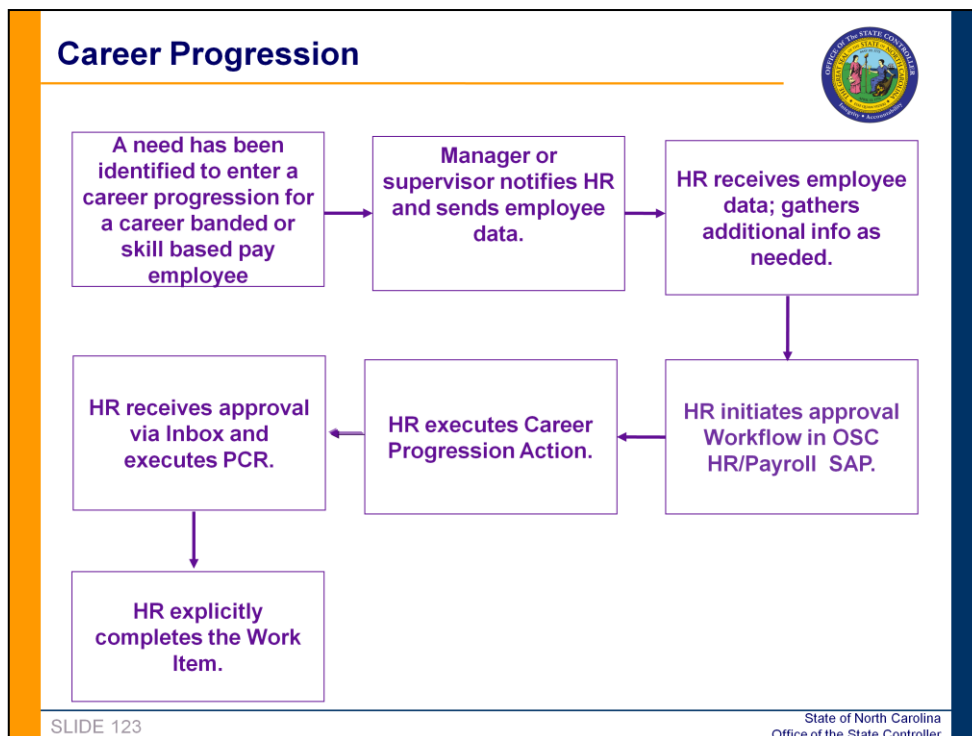
Notes

A Career Progression is used for employees in banded classes and may be granted in conjunction with demonstrated competencies or as justified through the labor market. For example, an employee was hired at a *contributing* level and given certain goals to reach to advance to the *journey* level. After the employee achieves goals his or her manager requests that the position be changed to journey. HR will then execute the Career Progression Action on the employee.

Career Progression is used when pay factors support a salary adjustment within the pay range of the career-banded class and when the employee attains and uses more advanced competencies in same position. Salary eligibility is based on application of all F.A.I.R.* pay factors. When an employee demonstrates required competencies in a position but is not yet at market index, s/he may receive a Career Progression.

Employees with active warning/disciplinary actions or with overall *below good* or *unsatisfactory* ratings are **not** eligible for a career progression adjustment based on competency assessment.

* F.A.I.R.

    F   Financial Resources

    A   Appropriate Market Rate

    I   Internal Pay Alignment

    R   Required Knowledge, Skills, and Abilities

Reasons for a Career Progression Action

- Grade Band Transfer
- CP – Comp/Skill
- CP – Labor Market
- CP – Comp Level Change

Continued…

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Notes

- **Grade Band Transfer** – employee movement between banded and graded classes.

- **CP-Comp/Skill** - pay factors support a salary increase within the pay range of the employee's career-banded class in conjunction with the employee's attainment and demonstrated use of competencies in the same position. Overall competency level may or may not change. If a salary increase is not granted due to funding issues, and competency level does not change, a Career Progression Action is not processed.

- **CP-Labor Market** – an employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary increase is in order. Such a situation could be due to an adjustment in the banded class market rates in conjunction with a labor market study, implementation of a market reference rate with the agency/university, insufficient funding at time of career banding implementation to pay employee at appropriate rate, or removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

- **CP-Comp Level Change** – employee's competency level changes although a salary increase is not granted. Employee's attainment and demonstrated use of competencies results in a higher overall competency level. However, due to funding issues, or because employee's salary already exceeds the appropriate rate, salary is not increased.

Reasons for Career Progression Actions *(continued)*

- Broad Band level Change
- Broad Band Job Change
- Broad Band Salary Adjustment

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- **Broad Band Level Change** – a change in the level to which an employee is assigned.

- **Broad Band Job Change** – a transfer of an employee from one banded occupational group to another banded occupational group.   This may or may not involve position number and salary change.   The Object ID (job) must change, therefore, you must coordinate with Organizational Management. If a salary change is involved, the reason for the adjustment and justification for any increase exceeding 10% should be included in the **Comments** section.

- **Broad Band Salary Adjustment** – Career Banding Grade – Band Transfer Adjustment – use of this reason must be approved by the Office of State Personnel /Office of State Budget and Management (OSP/OSBM.)

DENR and DOT

- In OSC HR/Payroll, the Department of Environment and Natural Resources (DENR) will use a Salary Adjustment Action with In Range-Other Labor Market as the reason. The agencies will not use a Career Progression Action to increase employees pay for skill blocks or Skill Based Pay (SBP).

- The Department of Transportation (DOT) is currently using a Salary Adjustment Action for SBP and will continue doing so with In Range Labor Market as the reason. For more information about SBP for DENR and DOT, contact the Office of State Personnel.

Lesson Review

In this lesson, you learned to:

- Describe the Work Against process
- Describe Dual Employment
- Identify additional Actions:
  - Demotion
  - Investigatory w/Pay
  - Suspension
  - Cancel Salary Adjustment
  - Career Progression

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Notes

Course Map

Lesson 1: Review of PA Infotypes

Lesson 2: Introduction to Actions

Lesson 3: Entering Employees into SAP

Lesson 4: Adjusting Salaries

Lesson 5: Promoting Employees

Lesson 6: Separating Employees

Lesson 7: Entering Transfers

Lesson 8: Reviewing Additional Actions

Lesson 8: Course Review

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Notes

Course Review

In this course, you learned to:

- Describe the process for the various Actions
- Create new records associated with the life cycle of an employee
- Modify existing employee data

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Notes

Next Steps

Monitor OSC HR/Payroll communication

– BEST Shared Services web site (especially the Updates tab)
  • URL: http://www.osc.nc.gov/BEST/index.html
– BEACON Training website: **What's New** link
  • URL: http://www.osc.nc.gov/beacon/training/whats_new.html

Review conceptual materials

Access BEACON Help

– Access from an SAP transaction
  • URL: http://help.mybeacon.nc.gov/beaconhelp

Practice what you've learned

  • URL: https://mybeacon.nc.gov
– Client 899
– Use your current NCID user name and password

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Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

• Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.
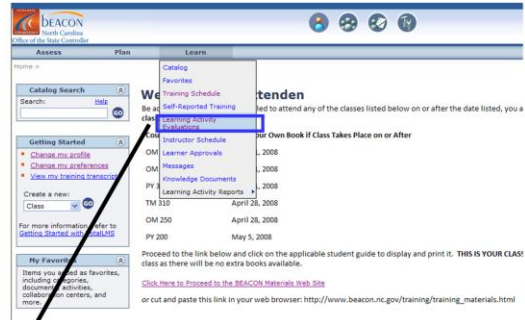
Need transactional assistance after go live?

• Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

Notes

1. Open a new internet browser and type the url:

   http://rod.sumtotalsystems.com/beacon

2. At the Log On screen, enter your full email address and password. If you cannot log into LMS, unmute your telephone and let the instructor know. The instructor can reset your password if you have forgotten it.

3. Click **Logon**.

4. On the blue horizontal bar near the top of your screen, click **Learn**, and then click **Learning Activity Evaluations**.

5. Locate the evaluation that corresponds to the class you've just completed and click the **Start** button to launch it.

6. Complete the evaluation.

7. Click the Training Center icon and then click the green check to let the instructor know you have completed the evaluation.

If you cannot access the evaluation, please unmute your telephone and let the instructor know.

Notes